

Creating and Documenting FrameMaker Templates

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Whether you are using RoboHelp, Microsoft Word, or FrameMaker, creating templates ensures consistency across all forms of documentation. You will see productivity increase because the structure and formatting of the document is already set—authors can begin writing content immediately. Customized templates can help your staff create a reputation for producing professional and consistent documentation.

Develop a strategy

Developing templates for a multiple chapter FrameMaker book can be a significant project. Your design may call for separate templates for the cover page, table of contents, chapters, glossary, and index. With some initial planning and teamwork, the benefits of implementing templates are worth the effort. Take time to develop a strategy before you begin building the templates in FrameMaker. Here are several tips for success:

- Contact corporate communications, marketing, or other related departments and ask if there are existing styles and standards you should incorporate into your templates.
- Gain support from management to enforce the use of the template. A manager or editor can determine if unauthorized changes are being made.
- Determine your template enforcement rules in advance of the design. This lets your authors know what they can and cannot change in the template.
- Determine your formats and styles up front.
- Involve the group. Create several prototypes and ask the group for feedback. Management can make final decisions when the group cannot reach an agreement.
- Document all style settings and text frame properties as you go.
- Set a due date for completion so the templates become stable in a reasonable amount of time.
- After the templates are stable, do not make any changes without first involving management and the group.

Roadblocks to success

As you are developing a strategy, consider the major reasons why authors may be hesitant to use a template:

- Bad template design—if the template is inadequate, authors are forced to modify the template to properly present the information or to work efficiently.
- Failure to involve the group in the template development process. Authors should have the opportunity to contribute ideas based on their experience and expertise.
- Failure to adopt template enforcement rules in advance can give the impression that authors can modify the template at their discretion with no consequences.

- Failure to finish the template design in a reasonable amount of time can turn the templates into a never-ending work in progress. This lack of stability causes frustration to the authors and inconsistencies in published documentation.
- Ineffective management—no one holds authors accountable for using the templates.
- Inadequate documentation and/or no training on how to use the template.

Document the template design

After creating your templates, create a “how to” guide that explains how to use the templates. In addition to step-by-step instructions, the guide can include settings for margins (text frames), paragraph and character tags, headers/footers, variables, and cross references. The “how to” guide reduces the learning curve when using the template and serves as one form of reference for all authors. The guide also provides documentation of margins and style settings in case something is accidentally changed.

Here are additional items you can include in the “how to” guide:

- List of all paragraph tags in the template and the purpose of each
- Table formats
- How to insert graphics, notes, and tips
- How to generate a perfect index and table of contents
- Master page specifications
- Individual paragraph and character tag specifications
- How to create a PDF file (Acrobat Distiller jobs settings, etc.)

Provide training

Conduct sessions to train authors on how to use the templates. You can use the “how to” guide as the class workbook to familiarize authors on how to find the information they need.

Conduct review sessions

Conduct periodic group review sessions so authors can provide feedback about the template. It is likely that as you begin to use the templates, you will find a need for additional paragraph tags or master pages to accommodate certain types of publications.

Additional information

You can find more information on this subject at <http://www.leighrichardson.com>. Click “Presentations” to find a copy of a related PowerPoint presentation, a sample “how to” guide, links to FrameMaker templates and tutorials, and an article about template design guidelines.