



# Creating & Documenting FrameMaker Templates

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# Overview

- Why you should create templates for your group
- Tips for success
- Reasons why people *won't* use your template
- Potential book template files
- What to include in the “how to guide”
- Resources for additional information

# Why use a template?

- Ensures consistency in all documentation
- Everyone has their own vision of what looks good
- Productivity increases because structure and formatting is already set—you can start with content immediately
- Create a reputation for publishing professional and consistent documentation

# Why document your template?

- Reduces the learning curve when using the template
- One form of reference for all writers; everyone follows the same steps, uses the same formatting, etc.
- In case a paragraph tag or text frame is changed, you have documentation of the original setting
- Consistency across all documentation

# Develop a strategy

- Contact Corporate Communications or other similar department to determine if certain document standards exist
- Gain support from management
- Determine your formats up front:
  - Styles/paragraph tags
  - Margins
  - Headers/footers

# Tips for success

- Gain support from management to hold people accountable. A manager or editor can determine if ad hoc changes are being made without approval.
- Determine template enforcement rules in advance of the design.
- Optimize the template so the writer can work efficiently. Keep it simple!
- Train the group to use the templates properly. Provide the “how to” guide as the class workbook.

# Tips for success

- Document all settings as you go
- Involve the group; create several prototypes and ask for feedback
- Management can make final decisions when agreement cannot be reached within the group
- Select a centralized location to store templates
- Determine how future updates will be made and how often

# Reasons why people won't 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 development process
- Failure to adopt template enforcement rules in advance of the design
- Template never becomes stable

# Reasons why people won't use template

- Inadequate or no training for the group on how to use the template
- No documentation on how to use the template
- Ineffective management

# Book template structure

- Multi-chapter documents have any or all of the following:
  - Cover page (front matter)
  - Table of contents
  - Chapters
  - Appendix
  - Glossary
  - Index
- Each one is a separate template

# Content for the “how to” guide

- Cover page
- TOC
- Document structure
- How to create a FrameMaker book
- Paragraph and character tag specifications
- Master page specifications
- Index

# Resources

- [www.leighrichardson.com](http://www.leighrichardson.com) -- click Presentations
  - Copy of presentation
  - Sample “how to” guide
  - Dan Emory’s article on template enforcement
  - Links to FrameMaker template sites
- [www.Microtype.com](http://www.Microtype.com)  
Click Resources, then click FM Templates
- [www.Adobe.com](http://www.Adobe.com)