

Creating an Interactive Online User Guide

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Want to create a colorful, interactive online version of your FrameMaker® documents? Not many steps are involved in making the conversion: start with template changes in the FrameMaker files; create a postscript file; convert it into a PDF (Portable Document Format) file using Adobe Distiller®; and add final touches to the PDF file in Adobe Exchange®.

From FrameMaker® to PDF

Your client has published a user guide and now wants you to create an online version of it for the CD-ROM or Web site. If you've published the user guide with FrameMaker®, Adobe's document publishing software, creating a colorful, interactive online counterpart is a task that's easy.

Your viewers will use Adobe Reader® (freeware downloadable from Adobe's Web site) to view and print your PDF document.

Start with a Template

Since your FrameMaker template was originally designed for paper, start by sizing up the changes needed for online readability.

If your page size was 8.5" by 11", consider reducing the dimensions to make more of the page visible at a smaller onscreen size. The example document in this article is 6" by 8"—too tall to read a single page comfortably, but large enough to let the reader browse headings and use navigation features.

Navigation buttons let users browse through chapters or view the contents or index

No-cost color enhances readability and interest.

Cross-references are clickable hypertext.

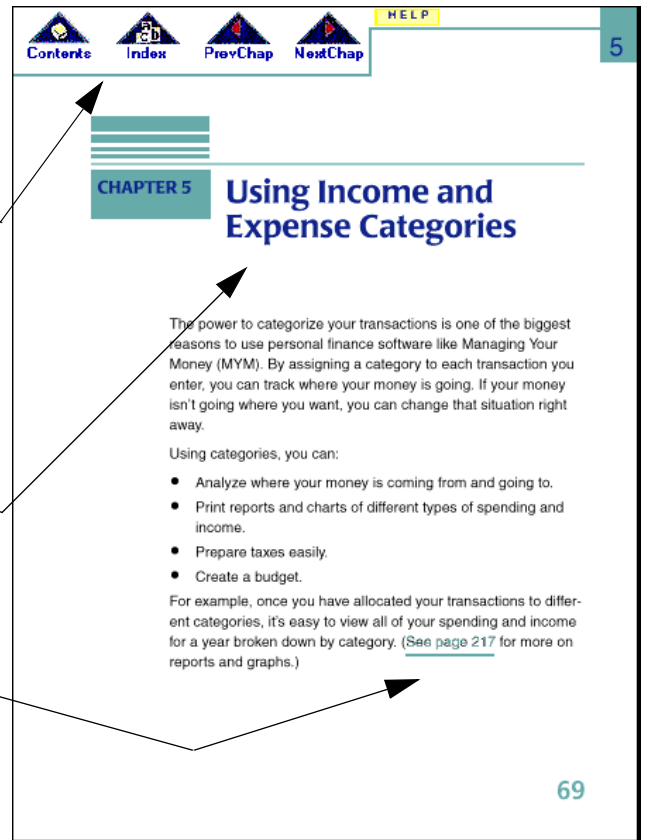


Figure 1. Elements of an Interactive Online User Guide

Besides reducing the page size, make other changes to your template, including:

- **Use color.** Modify tags for headers, footers, chapter titles, section heads, and captions to specify a color other than black. You can even change the document background color by assigning a color to the master page text frame. Color table borders and cells and figure backgrounds. Use the

16 defined colors, or better yet, create custom color definitions.

- **Modify paragraph and character tags.** Change all seraphed fonts to sans serif, and increase the line spacing, e.g., for 10-point type, make line spacing 14 points.

HANDY TIP: At the time of this writing, the best choice for fonts are postscript fonts such as Helvetica and Frutiger.

When I tried True Type fonts, a problem occurred in Reader: the Find tool didn't work. This meant that readers could not perform a full text search in the document.

Create Push Buttons

Push buttons for navigation, as shown in Figure 1, let users skim, search, and browse as if they were holding a book in hand. Using FrameMaker's drawing tools or other drawing package, create graphical buttons for Help, Contents, Index, Next and Previous Chapters. Put all buttons in the same location on the master page, ideally in a row on the left-hand side where, no matter what page magnification the reader uses, the buttons are always in view.

Make Interactive Links

When you click the Help button, what makes it jump to the Help page? Making this type of interactive link in FrameMaker is accomplished with a pair of hypertext markers: gotolink and newlink. Here's how it works.

On the master page, draw a text frame covering the Help graphic, then insert a hypertext marker into the text frame. (Choose Marker from the Special menu, then choose Hypertext.) The hypertext marker to use is "gotolink." The command you'll type into the Marker dialog is "gotolink filename:newlinkname" where *filename* is the file containing the Help page and *newlinkname* is the name used in the hypertext "newlink" marker you'll add to the Help page. See Figure 2 for hints on how to do this.

After inserting the gotolink marker in the text box on the master page, open the Help page. In the first paragraph, insert the hypertext marker command "newlink newlinkname." Adding the pair of hypertext markers that reference the same name creates the interactive link.

Repeat these steps for the Contents and Index buttons.

Add a "gotolink" hypertext marker to the Help button on the master page.

Add a "newlink" hypertext marker to the paragraph on the body page.

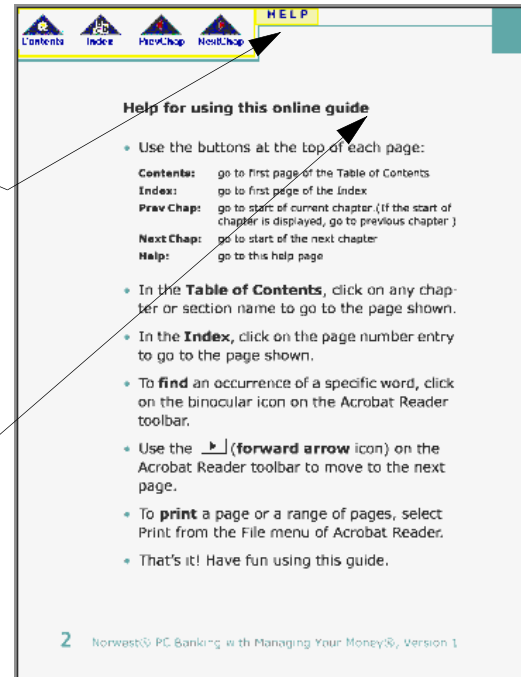


Figure 2. Help Page of an Interactive Online User Guide

Add an eye-catching front cover with a simple instruction on how to use the online book.

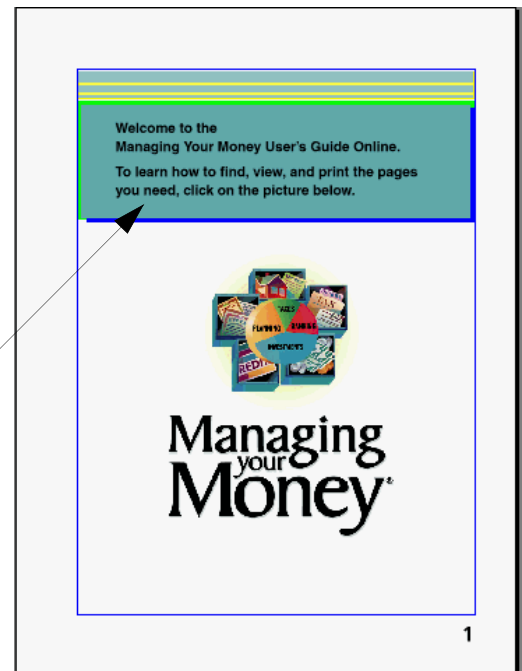


Figure 3. Front Cover of an Interactive Online User Guide

If you're adding Next and Previous Chapter buttons, you must add the gotolinks on the body pages rather than on the master page, changing the command line from, say "gotolink chapter1" to "gotolink chapter2" for each chapter.

What about other interactive links? FrameMaker automatically makes all entries in the contents and index, as well as all cross-references, into interactive links. So you don't have any extra work to do. However, you have another opportunity to add color to indicate a clickable link.

Don't Forget Help

In a printed document, you don't need to teach people how to use a book. But since no standards exist for online documents, you must tell people how they can find the information they're looking for.

Create a new page, like the one shown in [Figure 2](#), that describes the skimming, searching, and browsing controls available in your online document and in Acrobat Reader.

Add a Book Cover

To help viewers feel comfortable that they really are using something as familiar as a printed book, why not add a front cover? An attractive, colorful cover, like the example in [Figure 3](#), motivates readers to probe further into the document. Adapt the artwork from the printed user guide, and don't forget to add a hyperlink to move to other pages of the document.

Expand the Index

An online index is actually superior to its printed counterpart. FrameMaker automatically creates hyperlinks for each page number referenced in the generated index file. Readers just click on an index entry page number and jump there.

Furthermore, you can create a nifty thumbtab on the edge of your index

FrameMaker automatically adds hyperlinks for each page number.

Add a hyperlink table to the master page so that readers can easily jump to the part of the index they need.

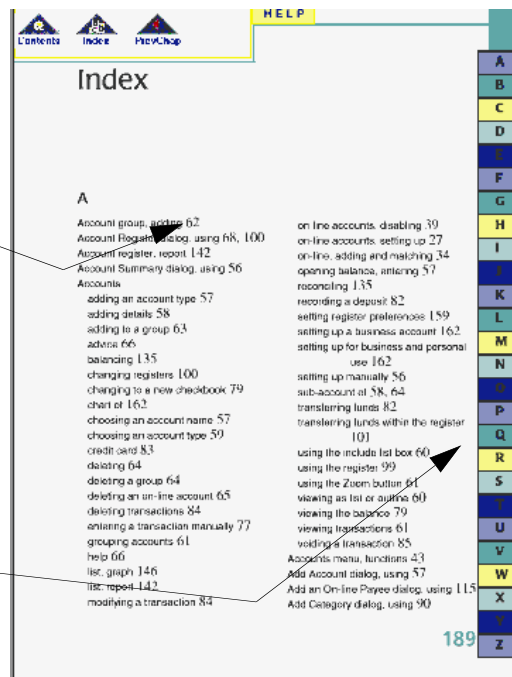


Figure 4. Index of an Interactive Online User Guide

pages to let users jump to any letter in the index. Figure 4 shows an example of this.

To make the alphabetical thumb tab shown in Figure 4, create a one-column, 26-row table, and type one alphabet letter into each cell. Then make 26 separate text frames to cover each letter. Insert a "gotolink A," "gotolink B," etc. hypertext marker into each text frame. The group titles ("A," "B," etc.) in the generated index have a built-in hypertext link, so there is no need to add newlink commands to the group titles.

Print to Postscript

After making all the fun additions to your FrameMaker files, you'll need to fix any pagination problems that may have arisen from changing fonts and page size. Then update the book file. The book file should contain all files in the user guide (front matter, contents, chapters, index), in order, each page numbered sequentially (i.e., don't use Roman

numerals for the contents and then start the first chapter on page one). If you added a front cover and a Help page, make sure the front cover is page one. This way the page numbers of the book will match the page number displayed in Acrobat Reader's status bar.

Update the book file, generating the contents and index, making any minor changes you'd like, including adding hyperlinked contents entries for "Front Cover" and "Help Page."

When you are satisfied that everything is in place, print the book file to a postscript file.

HANDY TIPS WHEN PRINTING TO POSTSCRIPT:

- Be sure that Adobe Acrobat® is installed on your computer. You'll use the Distiller printer driver—not the PDFWriter driver, which does not support hyperlinks.

- In the FrameMaker Print dialog, select the Acrobat Distiller printer driver. Make sure that under Setup/Properties/Postscript, the setting says “optimize for portability.”
- Check the box next to “Print to file,” and enter a name such as “usrguide.ps.” If you experience problems with broken hyperlinks (in Windows 95), try naming all files in your book file with standard Windows 3.1 names (i.e., 8.3 names). At the time of this writing, FrameMaker files with long (or too short) filenames caused hyperlinks to break when the postscript file was distilled.
- Check the box for “Generate Acrobat Data,” and in the Acrobat Setup dialog, select the paragraph tags to use for Bookmarks in Reader. Even if you don’t want any *Bookmarks* (the hyperlinks that can be displayed in the left-hand frame of the Reader window), you must generate Acrobat data or else none of the hyperlinks in your document will work.
- If you’re printing a large book with lots of screen shots, make sure you have 40 or 50 megabytes of free disk space for the postscript file.

Distill the Postscript File

If you’re following along with this article, do you now have a humongous postscript file? If so, you’re on the right track.

Launch the Distiller application. Distiller churns the behemoth postscript file into a manageable PDF file.

You may need to play around with the Job Options in Distiller. I found it best to set Graphic Compression to 4-bit ZIP to preserve the best quality for the screen shots. I also chose to embed all fonts. This makes the PDF file larger, but assures that all viewers see the same fonts: You don’t need to worry whether or not the document’s fonts are installed on their machines.

Another quirk when I used Distiller: Even though my page size was 6”x8”, I had to set Distiller’s page size option to 8.5” by 11” or else my pages in Reader were cropped off.

Touch Up in Exchange

Open and test your PDF file in Exchange, which is like Reader, but has editing capabilities.

Test everything: all hyperlinks, including buttons, contents entries, index entries, cross-references. Make sure the right page numbers are displayed. Test the Find tool. Print several pages. Make sure the graphics look and print correctly.

HANDY TIPS FOR TESTING IN EXCHANGE:

- Turn on the Links tool so that all of your links have a visible dotted line around them. This gives you an easy way to immediately spot a broken link.
- The FrameMaker document comes into Exchange as one long “article,” (unless you set the master page text frame to have different flow tags). You may experience unexpected magnification changes when you click on a page. To get rid of that annoying feature, select the Article command from the Tools menu. Then go to the first page of the first chapter and click on the text frame. A bounding box should appear. Just click Delete to remove the bounding box, and hence the Article attribute. Then the Hand cursor (used to move a page around on the screen) will look plain rather than have an arrow inside it, which indicates it is over an article.
- To make your final PDF file even smaller, use the “Save As” command. This automatically removes repeated references to the same graphic and makes other optimization changes to reduce file size.

NOTE:

This paper was created in FrameMaker and converted to PDF for the 1998 STC Conference Proceedings. To view it online, please access the conference CD-ROM. The online version demonstrates many of the concepts discussed in this article.

If you would like a sample FrameMaker file with all the attributes discussed in this article, please contact me at the address below.

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Wendy’s career in technical communication includes online interactive documents, tutorials and demos, WWW design, help systems, and multimedia programs. She is Past President of Central CT STC.