

Moving from FrameMaker to Blaze: Best Practices

Version 3

Moving from Adobe® FrameMaker® to MadCap Blaze™ is easy, although to get the best results you need to do some planning before you start. The first part of this document discusses suggestions and issues to make the result as clean as possible.

When using Blaze, you may want to do some complex layout or other advanced tasks. The second part of this document describes how to do some of these.

In this document, we talk about plug-ins and other tools from other vendors to help you clean up your FrameMaker files. MadCap is not associated with the companies or individuals who make these tools.

You don't need to purchase any of these tools to clean up your Frame files; they can just make it easier and faster. Many of the listed tools run in a Shareware mode.

This is a living document. If you have thoughts, ideas, or suggestions to make this document better or more comprehensive, send them to Sharon Burton at sburton@madcapsoftware.com.

In this document

About Blaze and FrameMaker	3
Best practice: Analyze the information in your Frame files before you start importing in Blaze	3
Before you start converting	3
Best practice: Cleanly formatted Frame files with no style overrides	3
Best practice: Logically structured FrameMaker files.....	4
Best practice: Consistently use and apply paragraph, character, and table formats	4
Best practice: All cross references and referenced files need targets.....	5
Best practice: Update the standard TOCs and imported by reference chapter TOCs	5
As you import.....	6
Best practice: The Import process creates “rules” that can be reused later	6
Best practice: Pay attention and be patient	6
Best practice: Try it several ways.....	6
Best practice: Slice your information into reasonable chunks	6
Best practice: Preserve FrameMaker styles.....	7
Best practice: Define your Blaze styles if you aren't using an existing CSS style sheet	7
Best practice: Map all your FrameMaker styles to the styles in your CSS style sheet.....	8



Recreating and cleaning up after you import	9
Best practice: Set up your master pages	9
Reference pages.....	10
Best practice: Organize your files, such as creating a graphics folder	10
Best practice: Move around and resize your graphics.....	11
Reuse what you did before	11
Best practice: Reuse your style sheet in the next project	11
Best practice: Use Parent projects to link projects and content	11
Now what?	12
Creating and using complex layouts in Blaze	13
Best practice: Creating room for side-heads	13
Best practice: Using text side-heads	14
Complex numbering.....	15
Best practice: Controlling auto-number formatting in lists	16
Numbered list method 1	16
Numbered list method 2.....	17
Best practice: Military numbering in a project	18
Best practice: Including graphics on the Page Layout	20
Adding a graphic to the header on your page	21

About Blaze and FrameMaker

Best practice: Analyze the information in your Frame files before you start importing in Blaze

Blaze is different than FrameMaker, not just because it's a different product, but because Blaze "thinks" about content differently than Frame.

In FrameMaker, you use a book with files to define your content. The smallest chunk of info is typically the file, or chapter. You assemble a group of files into a book, which is your deliverable. You can use Blaze the same way, in that you can open a topic and write a 50 page chapter 4, but the real power of Blaze will be missed.

In Blaze, you don't work initially with chapters; rather, you work with topics. Similar to Frame, you assemble the topics into the deliverable but you will have many more topics than you had chapters in FrameMaker.

Topics are the unit of content that you should be working with in Blaze. Topics are usually 2 to 4 pages of text, including any graphics. Topics probably map to the headings (Heading 1, Heading2, and so on) in your FrameMaker files.

Not all the information in every heading section should be a topic, though. For example, the information in your heading level 4s may not be able to stand on their own – this information may need the context of the information in the heading level 3 above it to make sense to the reader.

There are no hard and fast rules about size of the chunks of information and how to break it up. In general, a topic should be able to stand on it's own. This is where knowing the structure of your Frame files is going to help you a lot.

Before you start converting

The Blaze import process will require less work overall if you prep your files before you start. Make sure you make a backup of all Frame files first. We've identified no issues and your FrameMaker files should be untouched, but it's always better to be safe.

Best practice: Cleanly formatted Frame files with no style overrides

The more your FrameMaker files consistently use defined styles, the more smoothly the import process will be for you.

Make sure you use paragraph, character, and table formats consistently and with no manual overrides. For example, if you hand bolded text throughout your book, but the bold isn't a character style, it may be worth your while to create a Bold character style and apply it to all instances of hand bolded text.

Best practice: Logically structured FrameMaker files

The more logically you structure the information in your Frame files, the easier the information will be to work with in Blaze. For example, the information tagged Heading 1 should all the same kind of information.

If you have:

H1: Opening Files

H3: Editing Files

H2: Saving Files

H4: Printing Files

H3: Archiving Files

These are probably all H1 level headings and should be moved to be at the same level. You can do this in FrameMaker or you can use an outlining FrameMaker utility called Enhance, available at <http://www.sandybrook.com> for about US \$100.00. If you have a lot of files that need to be logically structured, Enhance is probably the way to go.

Best practice: Consistently use and apply paragraph, character, and table formats

Over time, it's easy for FrameMaker files to include many formats, some used and some not. It's also easy to have several formats that look identical and serve the same purpose. This can cause confusion after importing into Blaze.

You should delete the unused formats in your Frame files. You can do this manually, or use tools like the following to help.

To delete	Use this tools	Available from	Cost in US dollars
Unused Character formats	Character Tools	http://www.siliconprairiesoftware.com/	\$10.00
Unused Paragraph formats	Paragraph tools	http://www.siliconprairiesoftware.com/	\$10.00
Unused Table formats	Table tools	http://www.siliconprairiesoftware.com/	\$10.00

Make sure you understand how your files were designed. It's possible that you or someone else tagged different kinds of information with tags that look identical. You may not want to undo this.

If you have a lot of identical formats in your Frame files and they serve no purpose, you should consolidate these.

To help you identify identical tags, it might be useful to list all tag settings. Table Tools, Character Tools and Paragraph Tools, listed above, will create these lists.

To help you after you identify the formats you want to change, go to <http://www.frameexpert.com/plugins/findchangespecial/index.htm> and get FindChangeSpecial. It's about US \$30. You don't need this tool because you can find and change format names in FrameMaker, but this tool makes the process faster.

After import, you may still need to clean up the formats in Blaze. If so, it's probably worth purchasing MadCap Analyzer. It can show you unused styles, identical styles and other issues in your style sheets. You can delete, rename, and so on right in Analyzer.

Best practice: All cross references and referenced files need targets

To import your files into Blaze, Blaze (and FrameMaker) should be able to find all the files used. In FrameMaker, this is pretty easy – generate/update your book so it finds all the files the book. Even if you're only going to import one file from a book, this lets FrameMaker make sure it knows where everything is and how to find it.

If FrameMaker reports it can't find files or cross references, sort this out before you start your Blaze import.

Best practice: Update the standard TOCs and imported by reference chapter TOCs

If you are importing a book file that has a book-level TOC, the TOC is used to create a Blaze Outline. This saves you a lot of time and effort in recreating your FrameMaker TOC.

Before you start the Blaze import, make sure the FrameMaker book-level TOC includes the headings you want in the eventual Blaze outline. After you import into Blaze, you can add topics to the outline but making sure the FrameMaker TOC is correct saves you work after the import.

In your FrameMaker chapters, you may have imported by reference chapter-level TOCs. These will come thru the conversion process smoothly as topic-level Mini-TOC proxies. All you have to do before you import is make sure the chapter-level TOC is updated with the headings you want.

If you used cross references in Frame to imitate a chapter-level TOC, these come through as standard cross references.

As you import

All your file prep is going to pay off in the import process. This section assumes you've followed the best practices listed above. You have clean FrameMaker files that can locate all linked files.

Best practice: The Import process creates “rules” that can be reused later

When you import and convert files, you are creating “rules” for importing and converting the selected files. What's not obvious is that these rules are save and can be reused if you want to import more files in the future.

You can remove selected files from the Source Files list and add others. The rules you originally created are used to import and convert the newly selected files.

It pays off in saved time down the line is you make sure the Import is as clean as possible. The rest of the Best Practices in this section will help you do that.

Best practice: Pay attention and be patient

If you open the Import, specify a FrameMaker file, and click Finish, you're going to hate the results.

The import process requires that you make decisions about what you want, based on what you have. Because the structure of the information in FrameMaker files can vary wildly, pay attention to the decisions you're being asked to make and take the time to make them.

Best practice: Try it several ways

Because we offer you a lot of options on import, you may be uncertain what you need to select and why. At the end of the import process, we show you a preview of what your files look like. Take the time to scroll through the results and look at what happened.

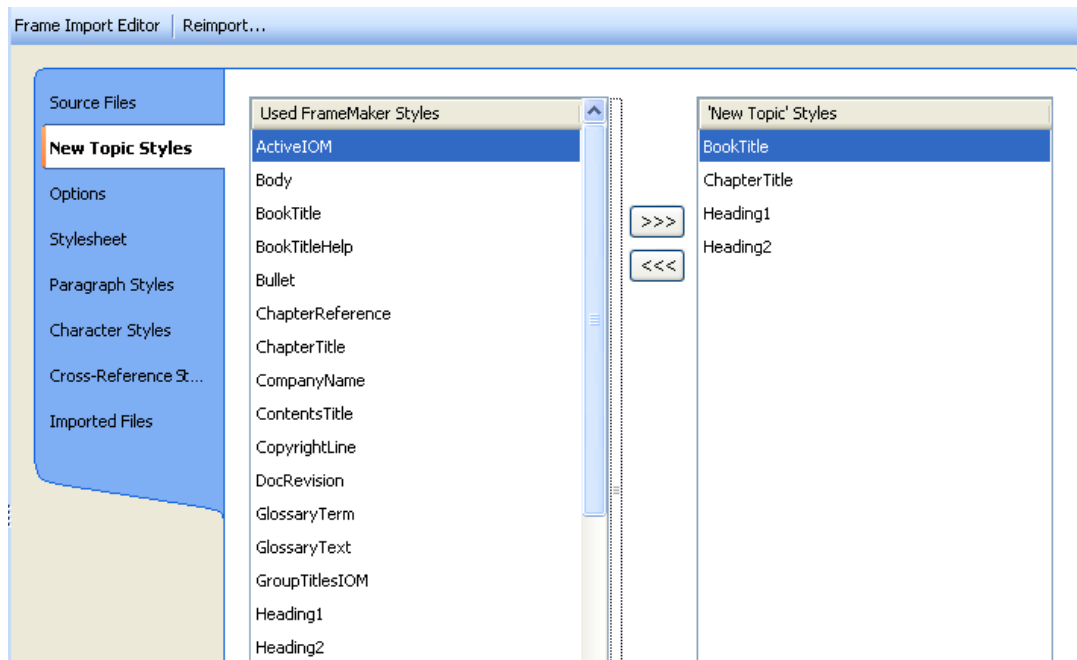
If what you see is not what you wanted, click Cancel and try other options. Rinse and repeat until what you see in the preview looks like what you want. We provide the preview so you can make an informed decision about your content before you commit to it in Blaze. Use that option and don't be afraid to cancel many times if needed to get what you want.

Best practice: Slice your information into reasonable chunks

The New Topics Styles tab is one of the most important places to stop and think when you are importing FrameMaker files into Blaze.

What you're doing is telling Blaze that you want your FrameMaker files chopped into topics, based on the paragraph formats you move to the right side of the screen. This is where the logically structured documents that you prepped, using the guidelines detailed earlier, will pay off.

In the example below, Blaze will make topics out of sections that start with BookTitle, ChapterTitle, Heading1 and Heading2. No other formats will be used to create topics.



At the end of the Import process, carefully review the topics to see if the formats you selected are the information chunks you want. If they are too large or too small, cancel and select other formats to see if you like those better.

Best practice: Preserve FrameMaker styles

If you have a robustly styled FrameMaker file that you like, and this is your first FrameMaker import, you probably want to Preserve FrameMaker styles on import.

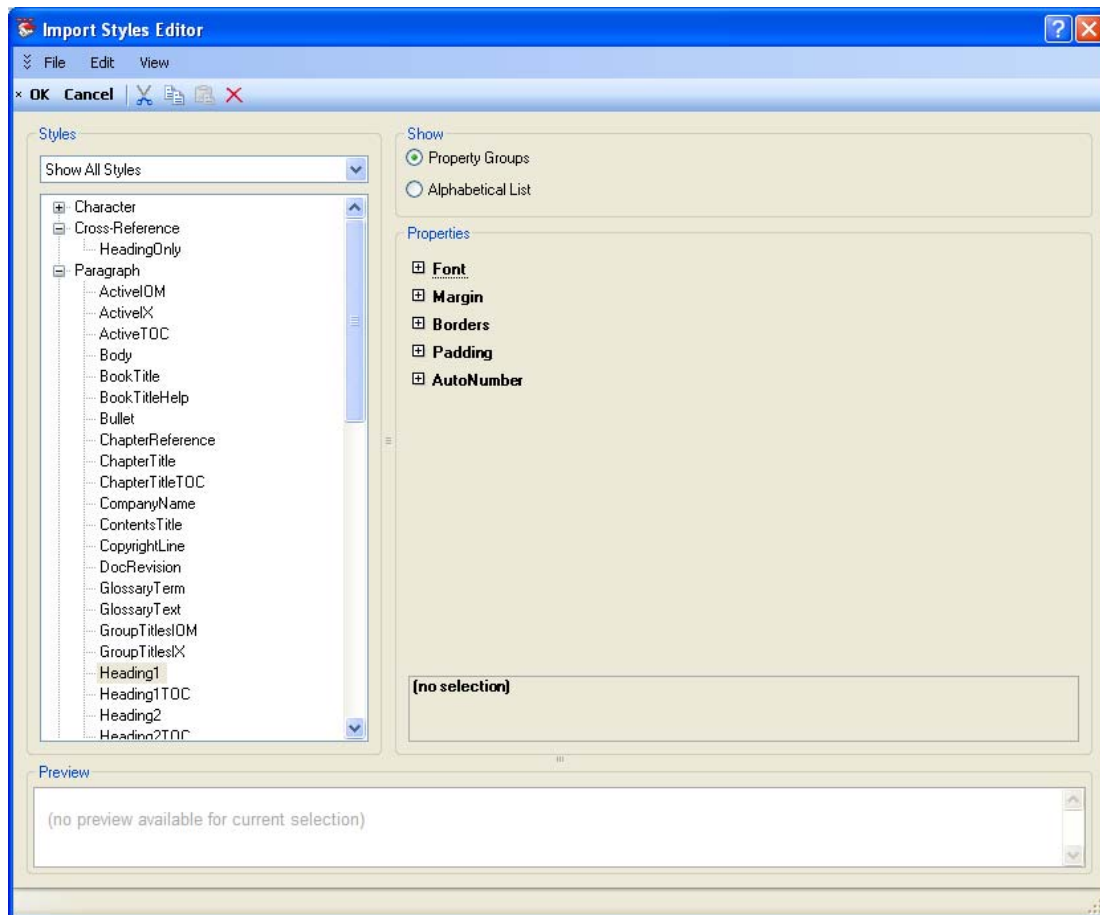
This serves 2 functions: It makes your Blaze documents look very similar to your Frame documents and creates a template that you can easily reuse in future projects. While it may be some work up front, it results in less work down the line - always a good thing.

A note here: if you select this import option, you will get a lot of “child” formats in your eventual style sheet. The names look like H1.Heading1 or H2.Heading2, where the part after the period comes from the style names in your FrameMaker files. These formats inherit some or all of their formatting from the parent (H1, H2, and so on) CSS style.

Best practice: Define your Blaze styles if you aren't using an existing CSS style sheet

If you opted to preserve Frame styles, edit the styles to look as you want them before you finish the import. Click the Conversion Styles button and start changing the formats.

You don't have to make the changes to the formats here – you can always do it after you import using the Style Sheet Editor, but it will seem easier to do it now. Your content will come through looking more like you expect.



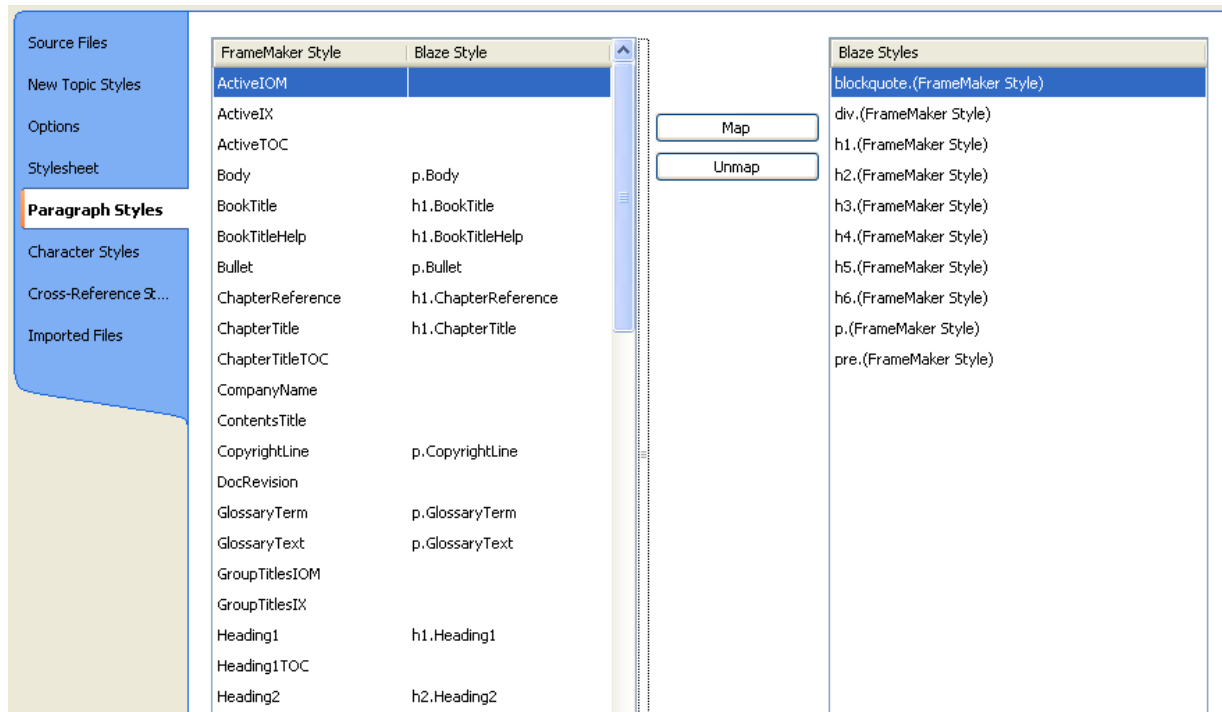
Best practice: Map all your FrameMaker styles to the styles in your CSS style sheet

When you reach the Import tabs for mapping your existing Frame styles to Blaze styles, make sure you map all of them. You can map Paragraph styles, Character styles, and cross-reference styles.

Unmapped text styles (paragraph and character) come through as `p.whateverthestylenamewas` (paragraph) or `span.whateverthestylenamewas` (character). This may result in lots of formats you didn't actually want in the style sheet and can take a lot to clean up. Better to control the mapping upfront and reduce the clean up afterwards.

Cross reference formats should also be mapped. If you don't, you could wind up with lots of `xref.whateverthenamewas`, which is probably not what you wanted and may also result in a lot of clean up.

Remember, because you can preview what the import looks like before you commit, make sure you review items like cross-references.



Recreating and cleaning up after you import

After you clean up your source files and import into Blaze, you will need to clean up or recreate certain things.

Best practice: Set up your master pages

Master pages from FrameMaker don't come through into Blaze. You need to recreate them as Page Layouts. The good news is that Page Layouts are more flexible than Master pages. For example, Frame won't allow different sized pages in the same file.

Blaze lets you have many pages defined in Page Layouts and they can be different sizes. This allows you to have a 8"x11" Page Layout that includes a 11"x14" page, for example, to allow for the fold out schematic you need in the middle of a chapter.

You can also have multiple sets of Page Layouts, something FrameMaker doesn't allow. This lets you define one set of Page Layouts for the 8"x11" PDF book you put on your website for customers to download. You can also define 7"x9" Page Layouts for the printed book you will send to the printer that needs to fit in the product box.

You will associate the Page Layout when you define your Target. See the Blaze online Help for more details.

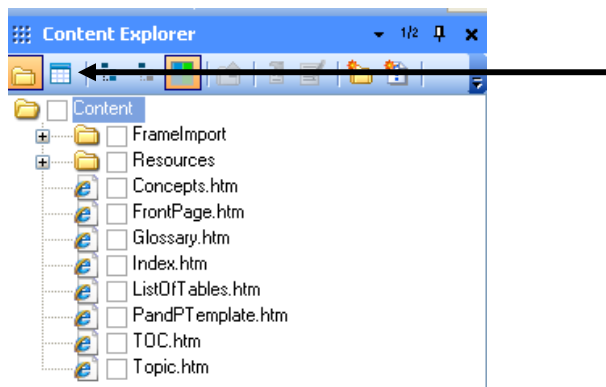
Reference pages

There are no equivalents to Reference pages in Blaze. The formatting and other tasks you are used to performing are done either in the Style Sheet Editor or in the Page Layouts or both. See the Blaze online Help for specific details about what you want to do.

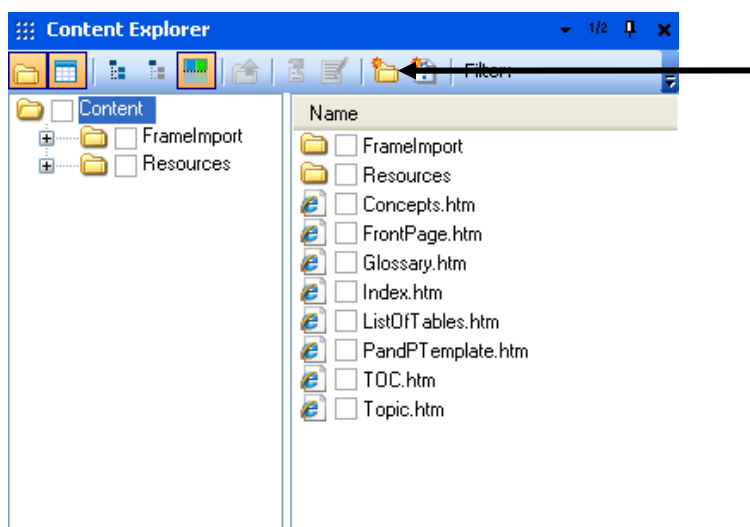
Best practice: Organize your files, such as creating a graphics folder

After you import, any graphics in your FrameMaker files are put in the same folder as your converted FrameMaker files. This looks messy and probably isn't what you wanted. You can easily fix this.

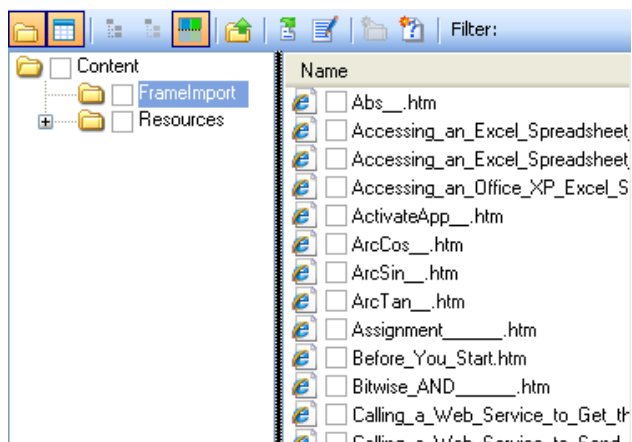
1. In the Content View pane, click the Show Files button.



2. A two pane view opens. You can expand your folders or create a new folder by clicking the New Folder button.



3. On the right side, select one or more files you want to move. Drag them to the folder on the left you want them to move to. All the standard Windows multi-select options are available.



4. You are prompted to update links when the files are moved. Make sure you click Update so that Blaze knows where these files have been moved to and how to find them.

Best practice: Move around and resize your graphics

Your graphics came through but, as with any conversion, there will be some tweaking to get them placed exactly where you want them, especially if your graphics were in the left margins in FrameMaker.

There are no anchored frames in Blaze. To select a graphic, click it, right click and click Select. Now you can right-click and click Properties to format and position the graphic the way you want it. See the Blaze online Help for specific details about what you want to do.

Reuse what you did before

After you get through one import and you like the way your content looks, you can reuse what you did in several useful ways.

Best practice: Reuse your style sheet in the next project

The next time you need to import another FrameMaker project, all the time and work you put into perfecting your style sheet will pay off.

During your next import process, browse and select the style sheet you already like. This reduces all the effort in defining and mapping styles. All you have to do is map styles and account for any new FrameMaker formats not mapped or created in your style sheet.

Best practice: Use Parent projects to link projects and content

In Blaze, all the project parts you created, such as style sheets, variables, Page Layouts, and so on, can be saved into a project. This project can be “imported” into another project using Parent projects.

For example, create a project that has all the standards you want; such as style sheets, variables, conditional text, Page Layouts and so on. Save this project to a network location that everyone can get to.

When you open a Blaze project, you can “link” the project to the parent project by creating a Blaze Parent import file. When you define the import, select the parts of the parent project you want to use in the child project. You can use some or all of the items you defined in the parent.

These items can be linked so that before the target is build, the Parent project is checked for any updates. The child project is automatically updated and then the target is built.

Now what?

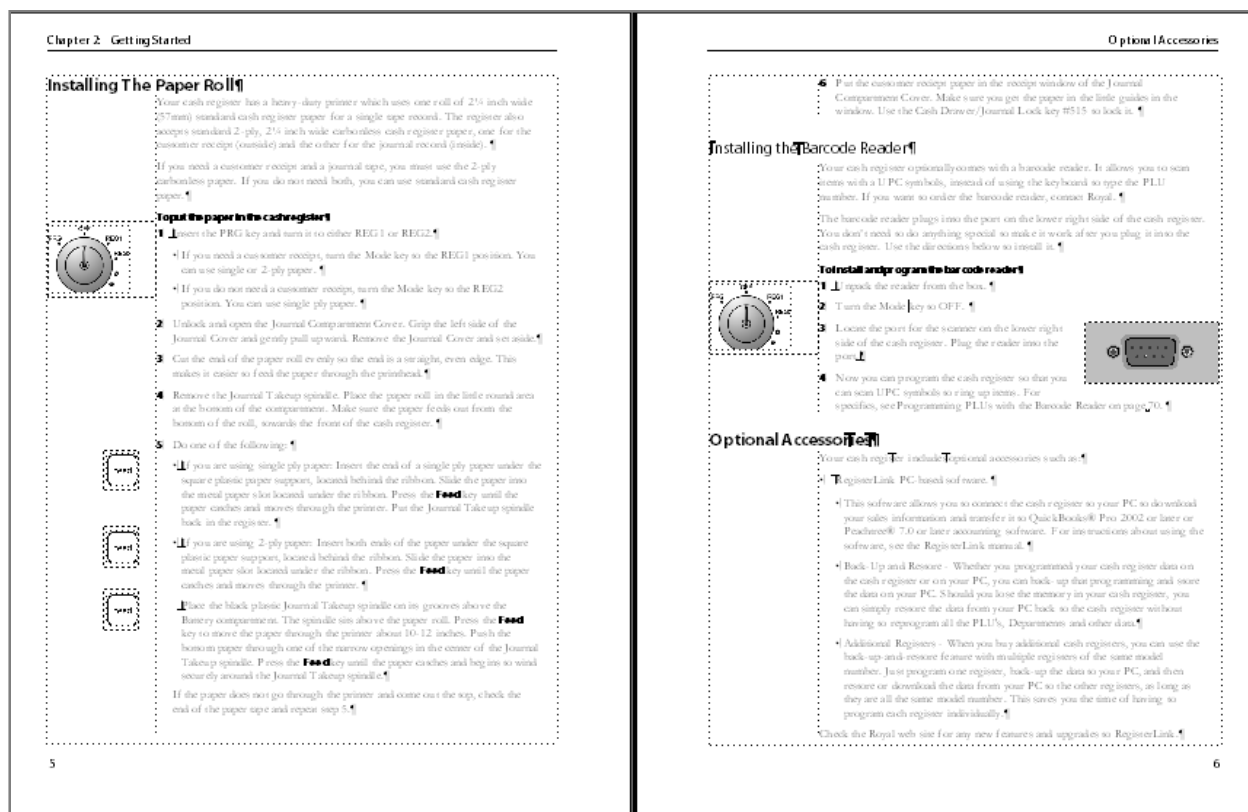
Now you can start:

- Adding more topics
- Working with conditional text
- Defining targets
- Creating snippets
- Creating outlines

And so much more. See the next sections or the Blaze online Help for specific details about what you want to do. And don't forget to ask questions of other Blaze and Flare experts in the Support Forums, available at <http://forums.madcapsoftware.com>.

Creating and using complex layouts in Blaze

A very common layout in a printed book looks like this:

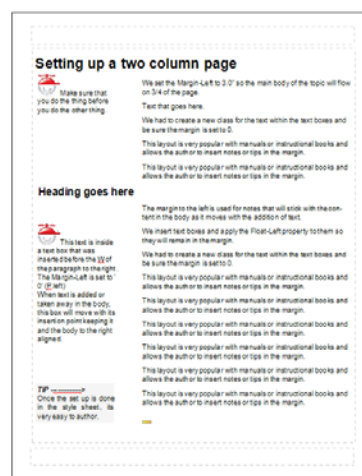


Let's look at the pieces and see how to do this in Blaze.

Best practice: Creating room for side-heads

A common layout for technical manuals looks like the graphic on the right. The left of the page is where the body text goes and the left side includes note, cautions and warnings. Headings span both "columns" or side-heads. This is an effective layout for many reasons: it has an open feel, information is easy to scan, and the page looks balanced. This section and the next explain how to replicate this layout in Blaze.

In Blaze, you add some styles to your style sheet and then use text boxes. The text boxes "follow" the body paragraph. You can also put graphics in the text box to show, for example, icons or other useful visual reminders. You can also put headings in the left area and have them wrap and stay next to the text on the right.



Set up the style sheet for the styles that you want to appear to the right. This may be many styles, so if you are using “inherited” styles, this will help. This example will show only very simple styles but you can adapt this method to your styles.

5. In Blaze, open your style sheet in the Style Sheet Editor.
6. Change or add the following tags:

P tag Set the Margin-Left to 2.5" so the main body of the topic moves over 2.5" from the left side of the page.

p.Note tag Create a new class for the text in the left “margin”. Set the Margin to 0.

Don’t forget to use Style Sheet Mediums to allow for different page sizes, if you have different sizes in different Page Layouts. If you have different sized pages, you will also want to change the space from the left for the body tags. For more details about creating and using mediums, see the Blaze online Help.

7. Save the styles. Continue changing all the right styles that you want. You probably won’t change the headings.

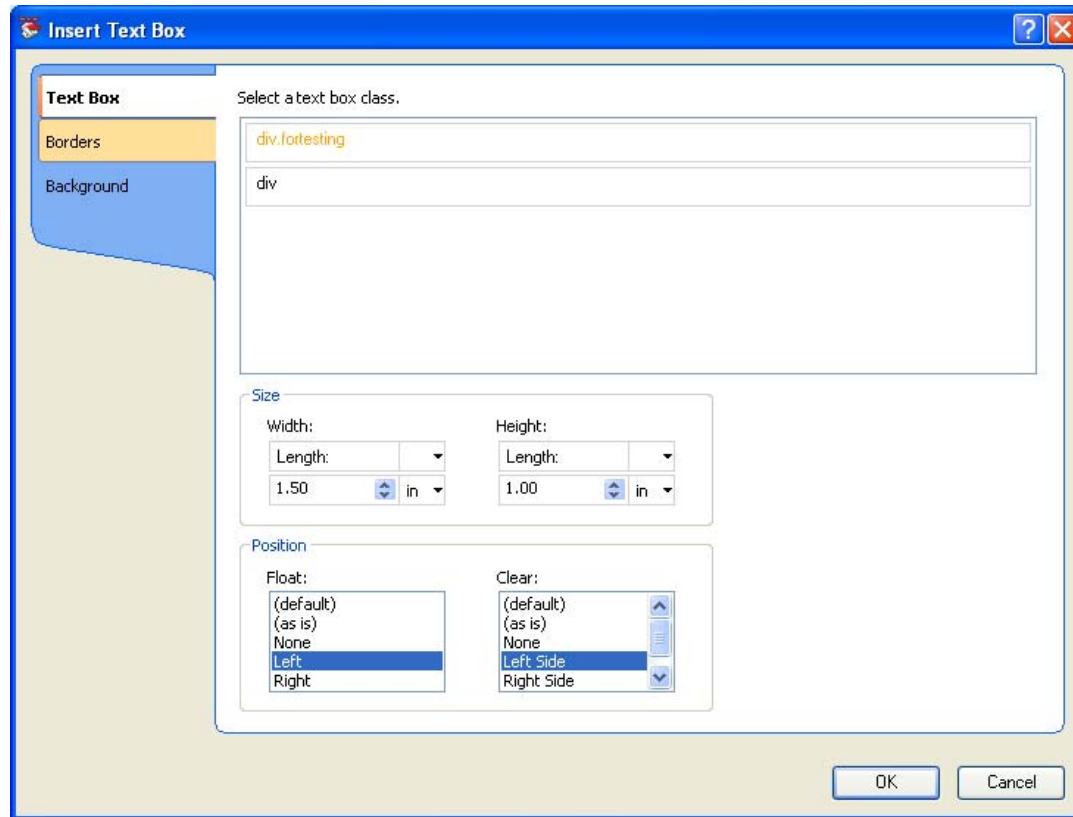
When you’re done, you’re ready to put text in the side-head. See the next section for more details.

Best practice: Using text side-heads

After you edit your style sheet, you place side-heads in Blaze.

In this example, we’re going to put the p.Note created above in the side-head but the process is the same for notes/cautions/warnings formats.

1. Open the topic.
2. Click at the beginning of the paragraph you want to place the Note with. Press Enter.
3. With the cursor on the blank line, on the Insert menu, click Text Box.



4. Select the width of the text box. In this above example, we specify 1.5" and 1".
5. Set the Float to Left and Clear to Left Side.
6. Click OK.
7. Click in the text box. Apply the Note format you created in the section above.
8. Now you can resize the text box or add text or a graphic.

You're done!

Using this method, you can customize and create complicated layout with sideheads on the right or left side of the page.

Complex numbering

Blaze offers many ways to number in your documents. This section discusses some of the most common.

Setting up a two column page



Make sure that you do the thing before you do the other thing.

We set the Margin-Left to 3.0" so the main b on 3/4 of the page.

We had to create a new class for the text wil be sure the margin is set to 0.



This layout is very popular with manuals or allows the author to insert notes or tips in th

This layout is very popular with manuals or allows the author to insert notes or tips in th

Heading goes here

The margin to the left is used for notes that \ tent in the body as it moves with the additior

Best practice: Controlling auto-number formatting in lists

You can use complex auto-numbering in Blaze. If you are familiar with auto-numbering formats in other products, you will see similarities in format and structure in Blaze.

In Blaze, you can click the Lists button and get simple lists, whether it's a bulleted list or a numbered list. There are not a lot of formatting options available to you in these lists. These may not meet your needs.

If you need custom lists, with specific number fonts, for example, you should create paragraph formats with auto-numbering. Do it this way lets you use character formats to customize the bullet or number you want for the list.

If you're creating a numbered steps list format, there are 2 ways to do this. Neither is a better practice than the other, it depends on what you need. .

Numbered list method 1

Assign a numbering series to a paragraph style that introduces a numbered list. This method uses 2 styles but results in only 1 style for numbered lists.

For example

To print a file

1

2 and so on.

If your document style guide specifies to always use an imperative fragment to introduce a set of steps, you can assign a numbering series to the imperative fragment style and set the style to restart numbering.

For example, if your imperative fragment format is called Procedure, you can assign the following numbering format and series to the Procedure style:

Enter format (preview below):

n:{ =0}

The big red dog.

Then the numbering for the Numbered list would be:

Enter format (preview below):

n:{n+}

2 The big red dog.

The advantage of this method is that you have 1 numbered style to remember to use and, because the imperative fragment **always** appears before a numbered list, the list **always** resets itself to start at 1.

Numbered list method 2

The second method also uses 2 formats but they are both numbered. For example:

For example

To print a file

1

2 and so on.

Create two styles named, for example, Step 1 and Step 2+.

For Step 1, define the number format like this to reset the number back to 1:

Enter format (preview below):

n:{n=1}

1 The big red dog.

Then in Step 2+, define the number as to increment the numbers from Step 1 forward:

Enter format (preview below):

n:{n+}

3 The big red dog.

There is no right way to restart the numbering. Use the method that works best for you and your information.

Best practice: Military numbering in a project

Military numbering here is defined as:

1.0

1.2

1.2.1

And so on. You can easily do this numbering in Blaze. Here's how.

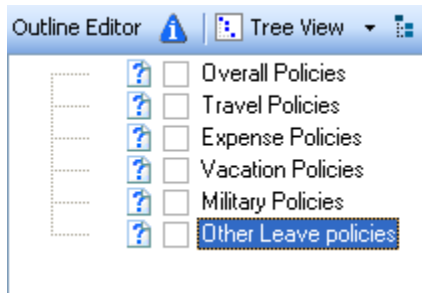
Note about using this numbering format with Tables: your table style cannot use captions. When you use the Caption option in the Table Properties or the Tables styles, the format for Caption does not allow auto-numbering. You must manually type the table caption before or after the table and then assign the text a paragraph style.

Create and assign styles that look like this:

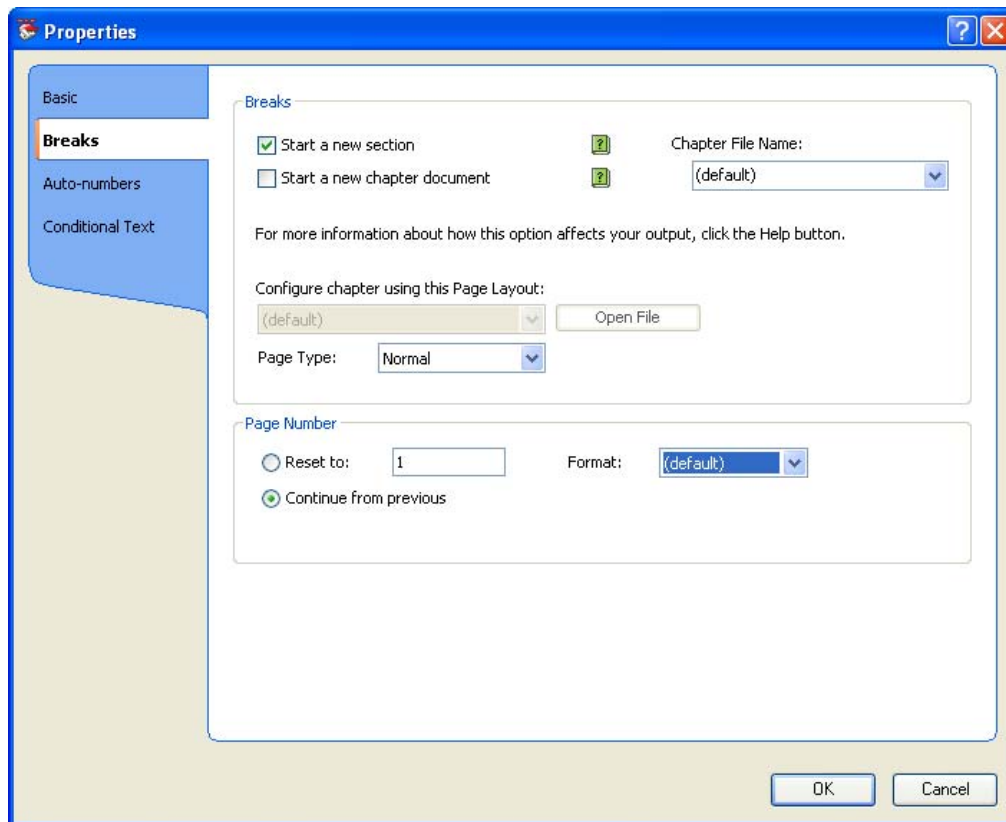
h1	h:{secnum}. {n=0}{ =0}{ =0}
h2	h:{secnum}. {n+}{ =0}{ =0}
h3	h:{secnum}. {n}. {n+}{ =0}{ =0}
h4	h:{secnum}. {n}. {n}. {n+}{ =0}
h5	h:{secnum}. {n}. {n}. {n}. {n+}
h6	h:{secnum}. {n}. {n}. {n}. {n}. {n+}
TableTitle	t:Table {secnum}- {n+}
FigureTitle	f:Figure {secnum}- {n+}

These styles will auto-number your headings, tables and figure captions. But you won't see the auto-numbering across topics yet. There's three more things to do.

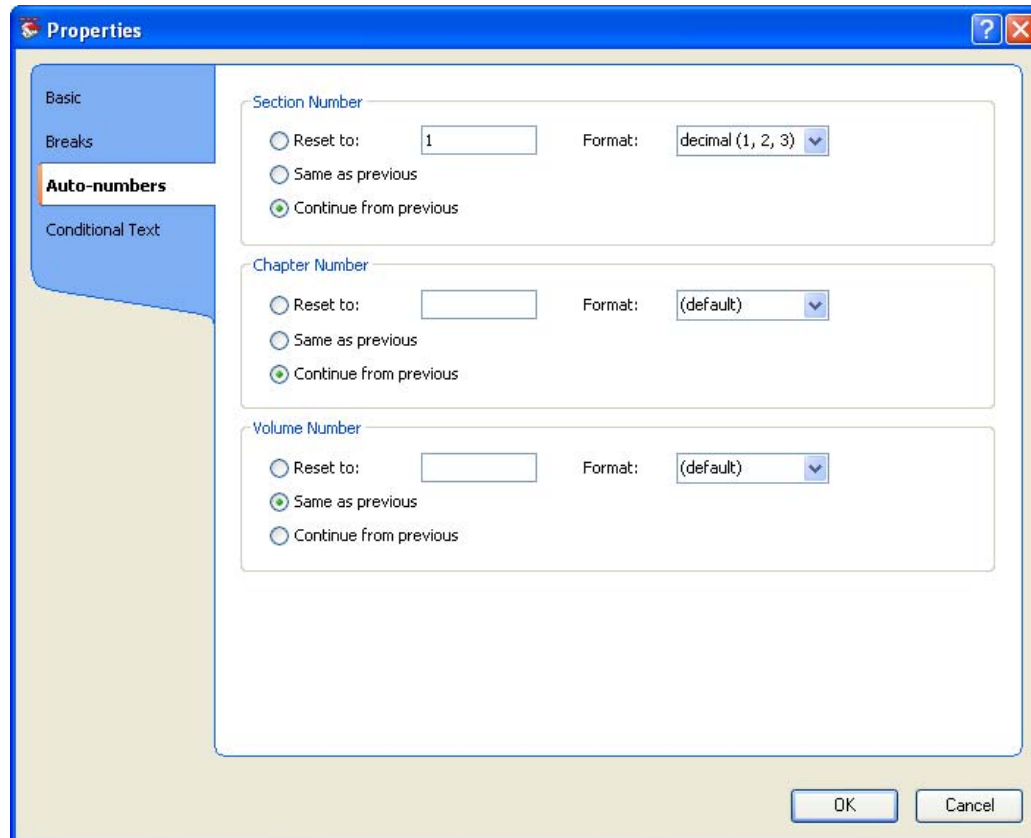
1. Go to the Project Organizer view and make an outline. Drag and drop the topics into the outline you want. For this example, let's assume a flat outline structure that looks like this:



2. After you have your outline the way you want it, click the first topic that should be a section. A section here is where you want the H1 to auto-increment. For example, it needs to change from 1.0 to 2.0. After you select that first topic, press F4.
3. In the dialog box that appears, click the Breaks tab.



4. In the Breaks area, select Start New Section. Now click the Auto-Numbers tab.



5. In the Section Number area, select Continue from Previous. This tells the topic that it should look at the last section that was numbered and increment by 1. If you want to change the numbering format, select what you want from the Format list. When you're done, click OK.
6. The last thing to do now is create a Target. For detailed instructions on doing this, see the online Help.

When you create your target, you'll see the numbering across sections. Review it to make sure the numbering is behaving the way you want. You should be done!

Best practice: Including graphics on the Page Layout

You can put graphics on the master pages to customize your page layout design. For example, you may have a page layout where you want a custom graphic on the first page of the chapter or section. Or perhaps you want the company logo in the upper corner of the right and left pages. Because you can have multiple Header text frames on a single page, you have a lot of options in page design.

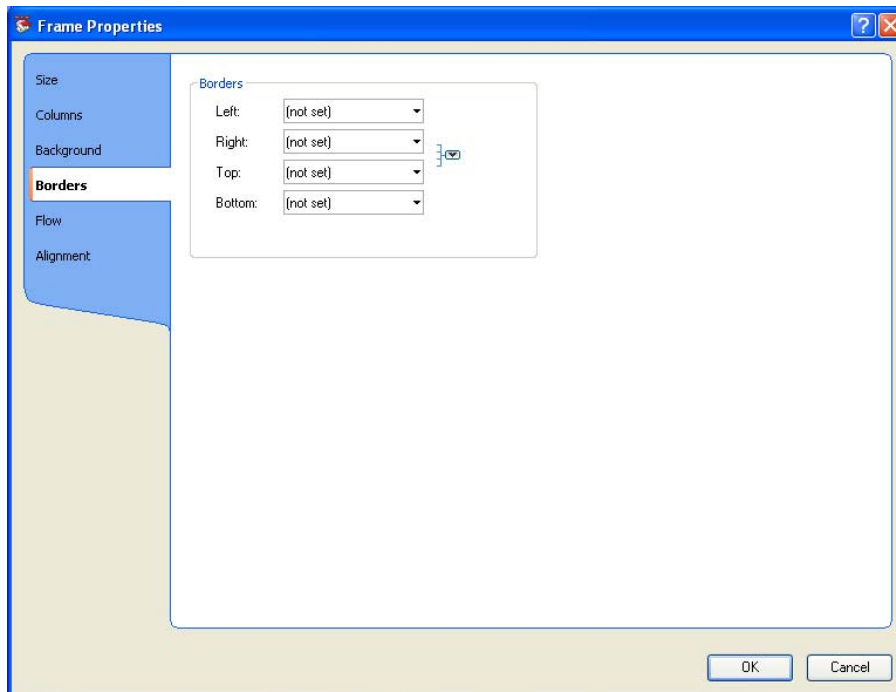
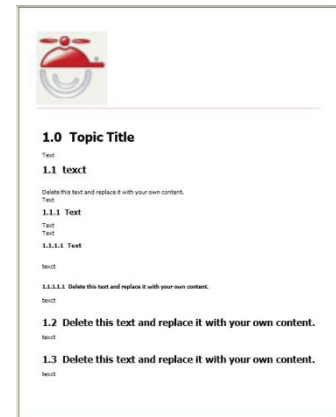
These sorts of layouts are easy to do in Blaze. Use the examples in this section to guide you.

Adding a graphic to the header on your page

1. Open the page Layout that you want to add a graphics to. For example, you want a custom graphic on the First page.
2. Create a new page called First. Assign it to be a Page Type of First. Place a Header and a Body text box on the page. Drag the Body text box where you want it to be on the page. Drag the Header text box where you want it.

For details on how to do these things, see the online Help.

3. When you're done, you're ready to put the graphic on the page. For this example, we want the First page to look like the one on the left.
4. Still in the Page Layout, click the Header text box and press F2. Click No. The Frame Contents view opens. Click in that area.
5. On the Insert menu, click Picture. Browse and select the picture you want to place. Click OK until you return to the Frame Contents view. Now resize the graphic, align it, and do other placement tasks.
6. If you want a line under or over the graphic, you can do that in the Page Layout view. Click the Header frame. Right-click and click Properties.



7. Now select the border that you want to add and make your changes. When you're done, click OK.