MIGRATING FROM FRAMEMAKER TO FLARE: PREPARATION AND PROCESSES

By Denise Kadilak
Information Architect/Team Manager

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ABOUT ME

- Information Architect/Team Lead with Blackbaud, Inc.
- 16 years experience
- Varied responsibilities
  - Creating and maintaining 1000s of pages of user-end documentation
  - Technical-project lead investigating new tools, best practices, and workflows for a 22-member documentation team
  - Led team's move four years ago to MadCap Flare
- Past presentations:
  - Agile-based development process at the 2010 WritersUA Conference
  - Structured authoring, trends in Technical Communication, and indexing at various local and international STC conferences
- Part-time instructor at John Carroll University in Cleveland, OH
  - Teach the Technical Writing course included in the school's Professional Writing program

BACKGROUND

Why we moved

After 11 years working in Adobe FrameMaker (five of those years in structured FrameMaker) Blackbaud decided the increasing demands on the documentation team (content shared between six overlapping product lines) required a move to a topic-based environment.

BACKGROUND

How we moved

Over an 18-month period, we:

- Created a Flare testing team
- Tested Flare
  - Authoring environment
  - Workflow options
  - Output options
    - HTML-based online help
    - PDF print

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BACKGROUND

How we moved

Over an 18-month period, we:

- Implemented a migration process
- Created the necessary templates
- Moved content

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MAKING THE MOVE

Three primary steps

1. Prepare FrameMaker content
2. Create Flare import
3. Clean content imported to Flare

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PREPARE FRAMEMAKER CONTENT

Clean existing documents

- Remove unused formats
- Remove unused conditions
- Remove style overrides
- Additional steps if in structured FrameMaker
  - Convert attributes to conditions
  - Change x-ref source type
- Fix broken x-refs
- FrameScripts are a big help

PREPARE FRAMEMAKER CONTENT

Confirm existing content is ready to import

- Generate book updates in FrameMaker
- Update TOCs
- Confirm content can be chunked into stand-alone topics
  - Five steps from legacy documentation to topics

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PREPARE FRAMEMAKER CONTENT

Confirm existing content is ready to import

- Create a “master” file that contains all formats you want to include in your Flare css.

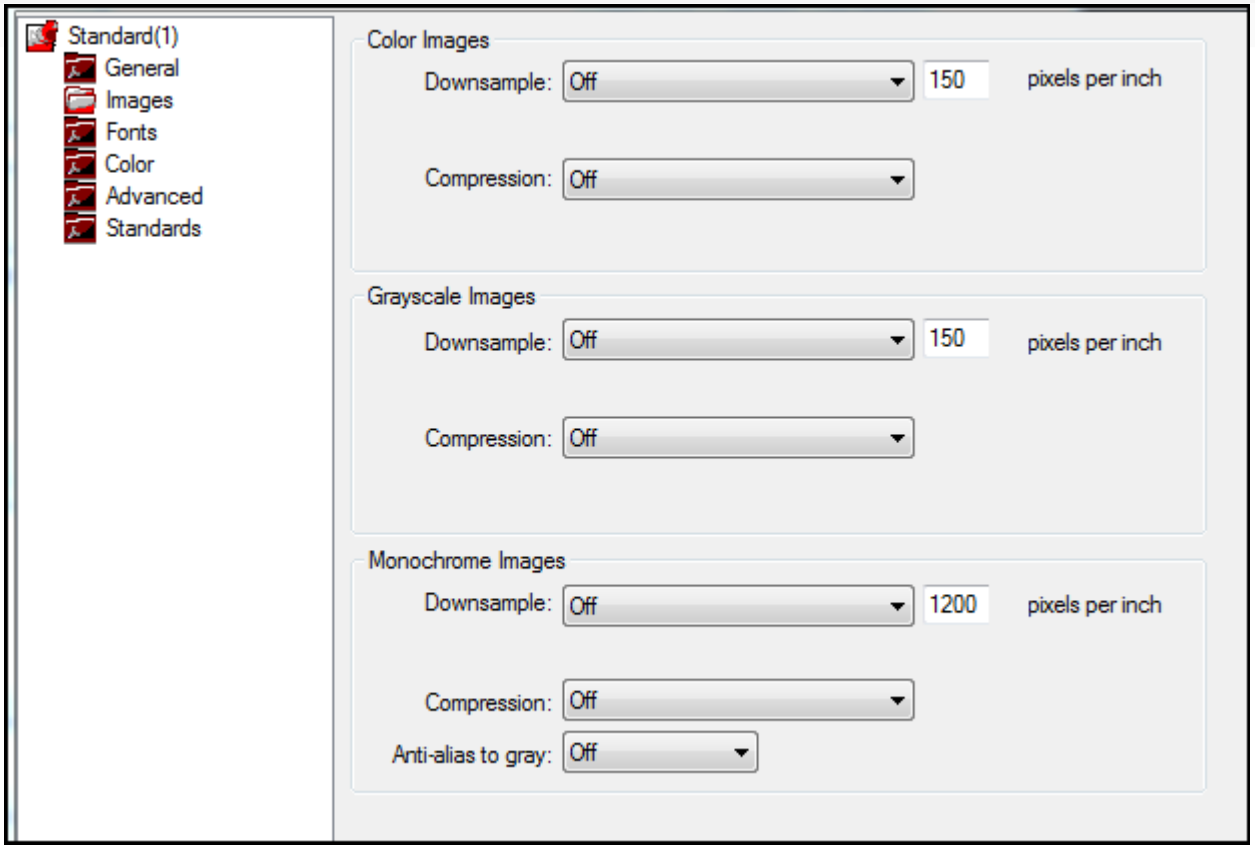
PREPARE FRAMEMAKER CONTENT

Confirm existing content is ready to import

- Set Adobe Distiller Settings:
  - Flare uses Distiller to convert graphics
  - Important to get your settings correct
  - I created a “Flare” Settings option in Distiller
    - In Images, set Downsampling to Off or None to prevent pixel reduction in graphics

SAMPLE SCREEN

Distiller XI



CREATE AN IMPORT TEMPLATE

Flare's Import Wizard

- Save import definitions
  - Create a new project
  - Import the "master" Frame file you created

- Options tab (page 26) – you'll need this later.

CLEAN IMPORTED CONTENT

Arrange topic and image files

- Topics and images import to one folder
- Output content mirrors Content Explorer structure

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CLEAN IMPORTED CONTENT

Edit CSS created during import process

- Define any formats missed during import
- Create mediums for each output need
  - Print
  - Online
  - Mobile

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CLEAN IMPORTED CONTENT

Create additional resource files

- Master Pages (online content)
- Page Layouts (print content)
- Snippets
- Table Styles

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CLEAN IMPORTED CONTENT

Create/edit project files

- TOC
- Variables
- Targets
- Conditional Text
- Skins

SUGGESTION

Create a template project and use global project link

- Condition tag set
- Images
- Master Page (breadcrumbs, mini proxy)
- Page Layout (show ours)
- Stylesheet (anything unique or invonvated)

SUGGESTION

Create internal documentation

- We used a Wiki
  - Import process
  - Working in Flare
  - Globally link projects
  - Template Instructions
  - Notes and Issues
  - Tips and Tricks

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PROBLEMS

- Binding to Team Foundation Server
- Stylesheet Editor awkward

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CONCLUSION

- Flare is a great tool with a lot of options
- It can overwhelm you
- Leaning it involves lots of trial and error
- Flare customer support very helpful
- Know that this is going to take time
- Be methodical

SWITCH TO FLARE OR MADPAK NOW AND SAVE UP TO $400

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Migrating from FrameMaker® to Flare Training Course, Web-based
February 26-27, 2014

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QUESTIONS?

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