Your Secret Weapon: The Documentation Bible

PRESENTED BY

Kate Schneider
Senior Technical Writer, MadCap Software
About Me

• Senior Technical Writer at MadCap
• 9 years in software industry
  – 6 as a technical writer – all using Flare!
  – 2+ years at MadCap!!!
What Will You Learn?

• Why do you need a Documentation Bible?
• What is (and isn’t) a Documentation Bible?
• How to create it
• How to maintain it
• How to train with it
• Best practices
The Problem

• No instruction from previous writer
• Inadequate time for 1-on-1 training
• Outdated training manuals
• Conflicting information
• Thrown in the deep end
The Solution: The Doc Bible

• Central repository kept in authoring tool
• Review, update, and add
  – Information stays current
• Reference and training tool
• Establish consistent voice and workflow
• Combats knowledge loss, inadequate time, redundant materials
What a Documentation Bible Is

How your team writes its documentation.

• Training
  – Procedures
  – Voice
  – Authoring tool
• Reference
  – Internal procedures/how-to
  – Style guides
• Sandbox
What a Documentation Bible is Not

- Your actual Help project
- Copy of a published style guide (e.g., Chicago)
- Flare Help
Creating the Doc Bible

• Set it up like your main Help project
  – Global Project Linking: conditions, styles, page layouts, snippets
Example: Global Project Linking
Example: Global Project Linking

Create in Project Import Editor

Add common project files
**Example: Global Project Linking**

Select applicable condition tags.
Creating the Doc Bible

• Set it up like your main Help project
  – Global Project Linking: conditions, styles, page layouts, snippets
  – Bind to source control
• Most important info and procedures
• Info you’d want to know on your first day
Welcome Topic

• Info about basic or important job tasks
• Reminders or guidelines
• Links to Read First topics
Example: Welcome Topic

Getting Started

Welcome to the MadCap Software Documentation team. The Documentation Bible is used by new and existing team members as a training tool and reference guide.

WHERE DO I BEGIN?

Welcome to the MadCap Documentation team! As a new team member, there is much to learn. That's why we've developed these suggestions to help you make a smooth transition into your new role:

- GET THE LATEST VERSION OF THE DOCUMENTATION BIBLE PROJECT
- LEARN TO USE THE DOCUMENTATION BIBLE
- REVIEW THE TEAM BASICS
- LEARN ABOUT THE COMPANY AND TEAM STRUCTURE
- REVIEW THE PRODUCT DOCUMENTATION
- GET THE LATEST VERSION OF THE SHARED PROJECT

IMPORTANT THINGS TO REMEMBER

While there are many important concepts and processes for you to learn, there are a few things that are important to keep in mind as you get started on the team. First, it is not expected that you will be an expert at how everything is done right away. Second, if you have suggestions, you are always welcome to discuss them with the team.

A few other things to keep in mind:

- ALWAYS USE COMPANY PRODUCTS
- ALWAYS PRACTICE HELP AUTHORING IN THE DOCUMENTATION BIBLE
- DO NOT MODIFY CONTENT IN THE SHARED PROJECT UNTIL ASSIGNED TO DO SO

Read this stuff first!

Team guidelines
How-To Topics

• Department procedures and workflows
• How does your team use:
  – Authoring tool features
  – Your company’s software
  – Third-party tools
• Login information, websites, etc.
About Palettes

When you capture an image, Mimic lets you add various types of objects to it (e.g., shapes, lines, or cursors). A palette is an element where you can store the objects you add for later use. You can use objects from a palette to add emphasis to an element in a frame. To learn how to insert objects from a palette into a Mimic image, see the Mimic online Help.

**HOW TO LINK TO SHARED PALETTES**

The Shared project has a special palette folder that contains the palettes we use for images in MadCap Software documentation. You must link to shared palettes before you can use them in Mimic.

You can learn how to do this by reading the Mimic online Help.

Shared palettes are located in `\fs1\Source\Documentation`, in the My Palettes folder.

**Note:** You will need to link to each palette individually.

**THE SHARED PROJECT'S PALETTES**

The following shared palettes are most commonly used for documentation and movies.

<table>
<thead>
<tr>
<th>Palette Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Callouts</td>
<td>Contains an assortment of callout objects. Callouts are used in most screenshots. You should use the centered pointer callout for most callouts, unless you are using a callout as a label. In this case you should use the centered rectangle callout.</td>
</tr>
</tbody>
</table>
### Example: How-To Topic

Our team uses a variety of notations throughout our documentation and everywhere can be found the table below to learn more:

<table>
<thead>
<tr>
<th>Notation Type</th>
<th>Applied Via</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emphasis</td>
<td>CSS</td>
</tr>
<tr>
<td>Examples</td>
<td>CSS</td>
</tr>
</tbody>
</table>

**Emphasis**

- This is an example of the span class named "span.SetOffFirstLevel". It is used to call attention to terms or important ideas in first-level bullet points. See [Emphasis](#).
- This is an example of the span class named "span.SetOffSecondLevel". It is used to call attention to terms or important ideas in second-level bullet points. See [Emphasis](#).

**Examples**

- EXAMPLE

  This is example text.
Style Guides

• Internal/department style information
  – Capitalization
  – Product names
  – Hex/RGB colors
  – Deviations from your main style guide
• Terms you’re always looking up? Add them!
• Link to company/published style guides
Examples: Style Guides

Punctuation
Select a drop-down below to learn more about punctuation rules.

- NOTE

- BRACKETS

Brackets have a special use in MadCap Software documentation. Use brackets to enclose placeholder text when documenting a value that the user must enter.

**EXAMPLE**

Here is an example from the Shared project that shows how to apply brackets to enclose placeholder text.

Notice that the action in bold can apply to any file. Instead of listing all of the possible files, the placeholder text "Name of Style" has been enclosed in brackets to represent the variable style names.

Appendixes

When referring to the plural form of the word, we always use the term "appendixes" to be consistent with the Chicago Manual of Style (even though the term "appendices" is also considered correct by most standard dictionaries). See also Appendix.
Audience Participation!
Maintaining the Doc Bible

• Most maintenance is done by new writers…
• Keep it current
• Add info as necessary
  – Especially true for lone writers!
  – Schedule time if necessary
• “To Do” topic, annotations
Training with the Doc Bible

• When most content is added
• Learning workflows and procedures
• Four stages
  – Reading
  – Updating
  – Writing
  – Review
Reading

• Learn procedures
• Ask questions!
• Independent learning
Updating

• Learn voice, style
• Out-of-date, errors?
• What can you add?
  – Notes?
  – Screenshots?
  – Snippets?

Learn How to Work with Snippets

To learn how to work with snippets:

» [Read the Online Help](http://www.madcapsoftware.com/support/onlinhelp.aspx)

Flare online documentation:
- [MadCapOnline](http://www.madcapsoftware.com/support/onlinhelp.aspx)

» [Search the Knowledge Base](http://kb.madcapsoftware.com)

Knowledge Base at: [MadCapKnowledgeBase](http://kb.madcapsoftware.com)

» [Go to User Forums](http://forums.madcapsoftware.com)

Visit the user forums at:
- [MadCapUserForum](http://forums.madcapsoftware.com)
Writing

- Practice techniques & workflows
- Add new topics, rewrite topics that need it
- “To Do” topic

To Do

- Add Tour of the Shared Project topics
- Add Doc Bible best practices
- Update (add?) publishing information to include process for FileZilla, etc.
- Update project build information to include information about adding files to the Staging server
- Update TOC topic with information about new structure for TopNav output
- Review documentation process steps. Looks like Step 8 is “coming soon” and some steps (source control) are outdated.
- Search for and remove duplicate topics
- Create snippets where applicable and useful
- Update screenshots throughout
- Review project checklists for outdated or inaccurate information; update where appropriate
- Check entire project for .Final style class on drop-downs
- Remove single notes/important/important examples from drop-downs
Review

• Typical internal review methods
  – Contributor, Flare internal reviews!
  – Alternative methods

• Review content, voice/tone, grammar
  – Track changes

• Peer reviews, team leader
  – Meet and discuss changes, questions, etc.

• Update Doc Bible if necessary
Audience Participation!
Doc Bible Best Practices

DO…

• Work exclusively in the DB
• Make the full Help project available
• Collaborate with other team members
• Let new writers ask questions and make suggestions
Doc Bible Best Practices

DON’T…

• Neglect the DB!
• Try to document everything on Day One
• Rewrite existing documentation
Sample Doc Bible Project

- Flare template
- Starter topics and basic resources
- http://assets.madworldconference.com/docbible.zip

(Also, go ahead and reuse this presentation to teach new writers how to use the Doc Bible!)
Thanks! Keep in Touch!

Kate Schneider
Senior Technical Writer at MadCap Software
San Diego, California | Information Technology and Services
Current: MadCap Software, Inc.
Previous: Renaissance, SpendSmart.org, dominKnow Inc
Education: Northeastern University

Send a message

https://www.linkedin.com/in/kateschneider

@MadCapSoftware
@MadCapDocTeam
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Questions?