Customer-Friendly User Guides with MadCap Doc-To-Help

PRESENTED BY

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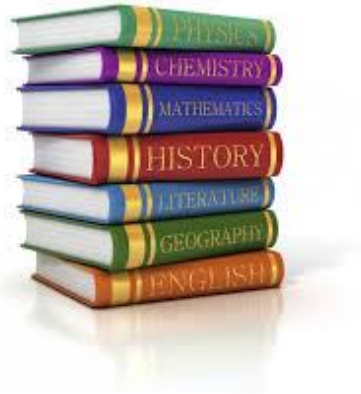
AGENDA

- Background
- Untangle the Complex
- Organize & Structure Your Document
- How Doc-To-Help Impacts Writing
- Sample Doc-To-Help Project
- Questions & Answers

Background

From Teacher to Writer

- Middle school teacher for over 15 years
- Technical writer for over 6 years
- Manager of writers for the past 3½ years



Untangle the Complex

TRANSLATE THE TECHNICAL

- Translate for the subject matter experts (SME)
- Technical writing is similar to curriculum development
- Break it down and rebuild it

BE THE READER’S ADVOCATE

- Dive into the software
- Click on every button
- Ask questions
- Remember, it is for the customer!

UNFAMILIAR TERMS

- Good explanations full of jargon
- SMEs take steps for granted
- Incorporate neutral third parties

Protocol?

Organize & Structure Your Document

SOFTWARE STRUCTURE

- Code is the foundation
- User interface is the window dressing
- What does the user need to know?
- Unlock the key components

BREAK THE SOFTWARE DOWN

- Stretch your understanding
- Identify the basic components
- Reassemble through organization

DOCUMENT BUILDING BLOCKS

- Overview
- Content
- Conclusion

Sound familiar?

Provide an Overview

Provide an overview to give your reader the lay of the land. This may be the reader’s first introduction to the software.

Content

Lay out content in an order which aligns to how the reader will be using the software.

Never Leave Them Hanging

Provide a summary or conclusion. Do not leave them wondering what is supposed to happen or what comes next.

REPLICATE THE PROCESS

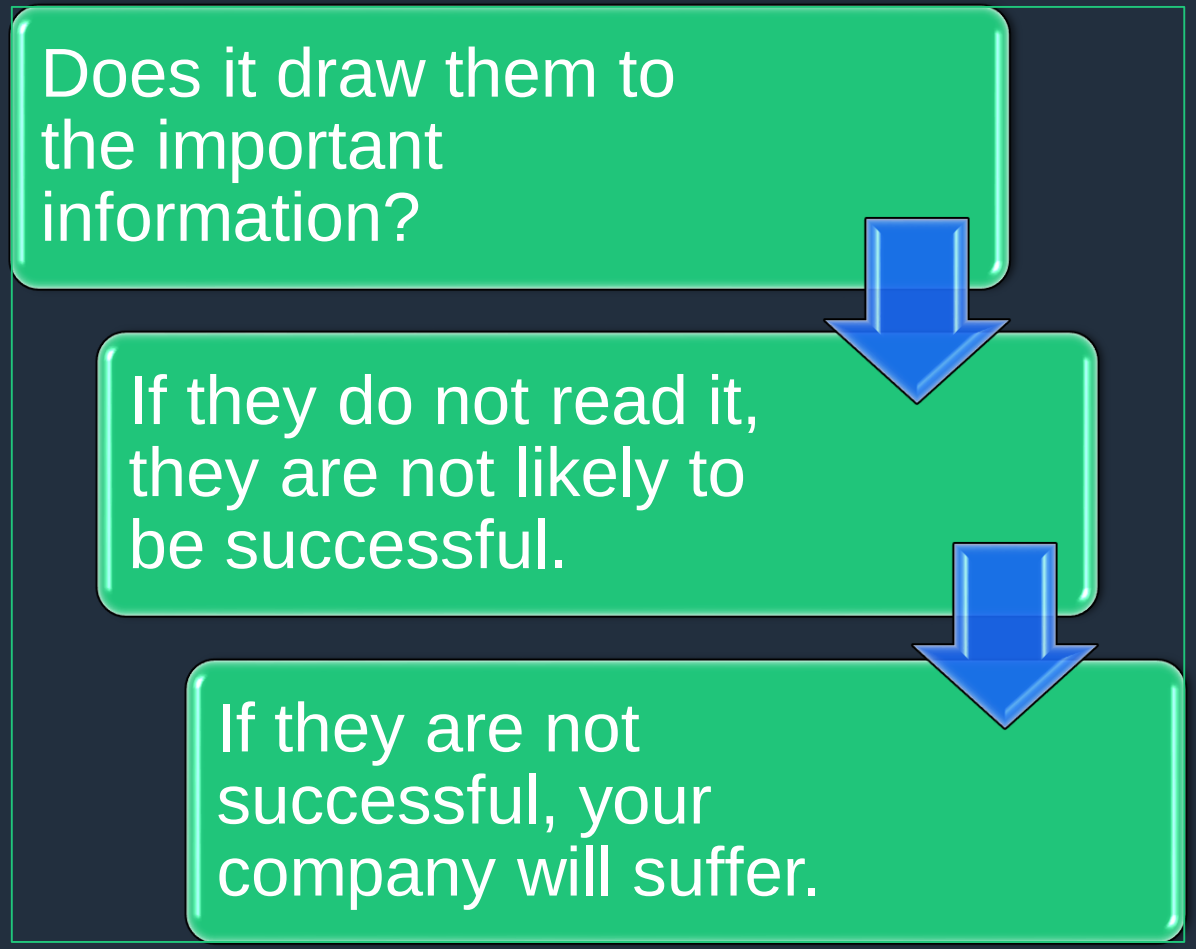
- User guide as a whole
  - Overview
  - Content
  - Conclusion
- Each individual section
  - Overview
  - Content
  - Conclusion

How Doc-To-Help Impacts Writing

DOCUMENT APPEAL

- Even a well-organized document can lack appeal
- Take a lesson from the entertainment industry
- Add visual aids
- Consider the format for the reader’s experience

WHY DOC-TO-HELP



- Work in Word
- Create needed outputs
  - CHM file
  - HTML files
  - PDFs
  - ePub
  - And more…
- Enhance final outputs with D2H capabilities

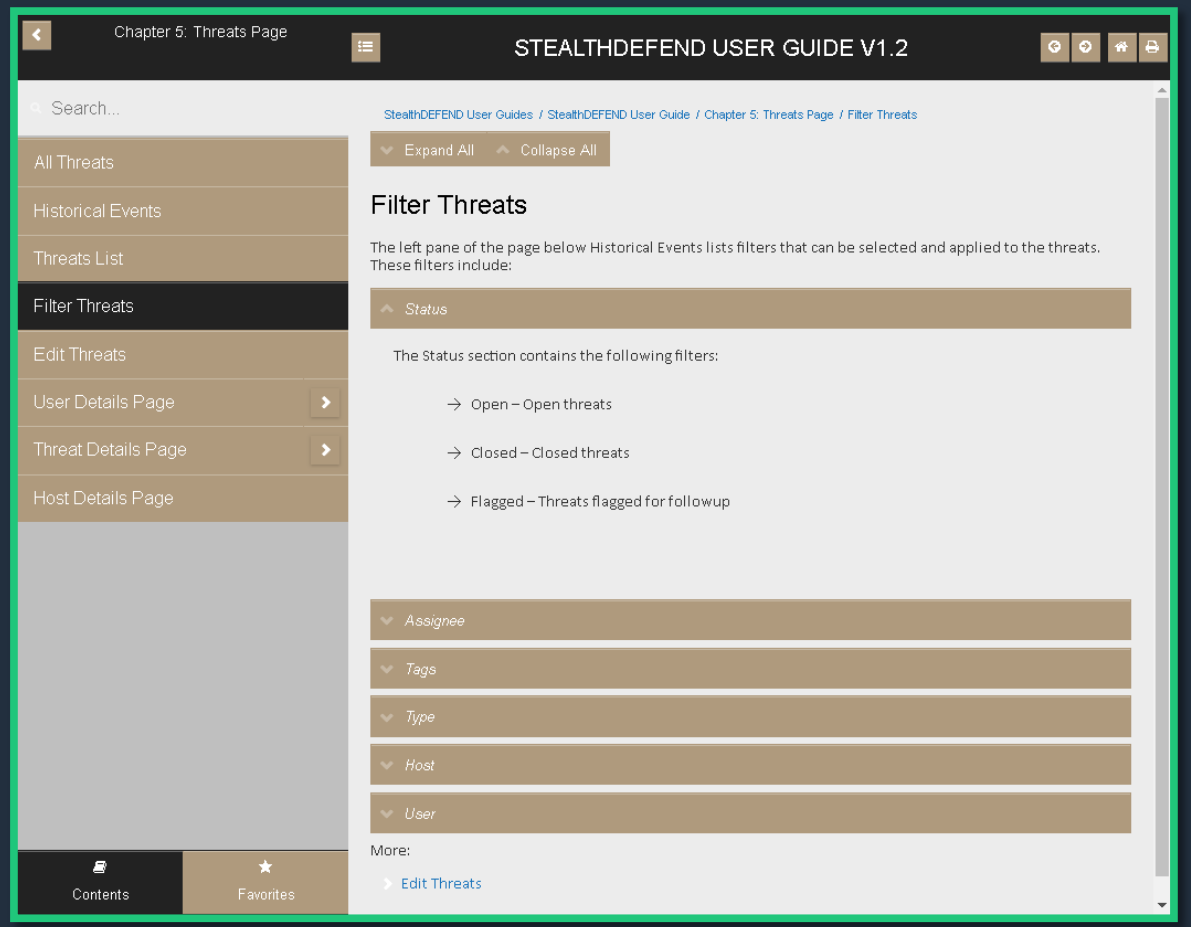
WORD STYLES

- Headings used for:
  - Page breaks
  - Table of contents
  - Related topics / navigation
- Limited to Headings 1-5
- Avoid headings with no text

- Bulleted Lists
  - Ensure correct rendering for the output
- Tables styles
  - Avoid merged cells

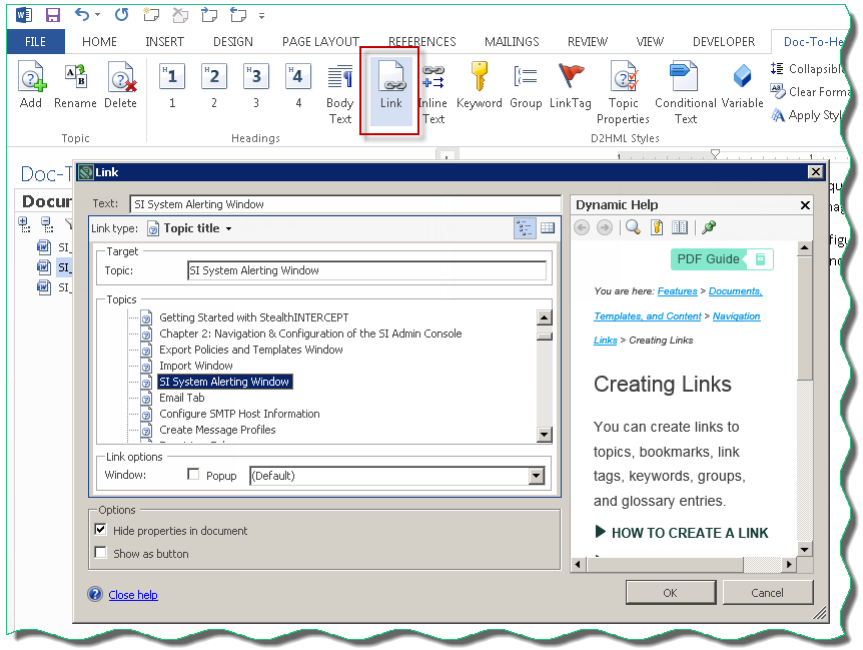
D2H COLLAPSIBLE SECTIONS

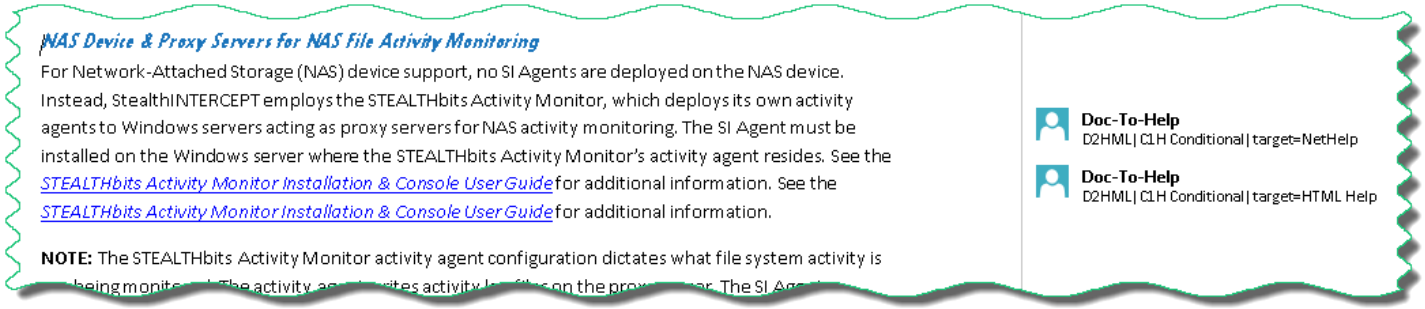
- Limit page breaks due to formal heading styles
- Keep content with parent heading in output
- Reader chooses what to expand



D2H LINKS & CONDITIONAL STATEMENTS

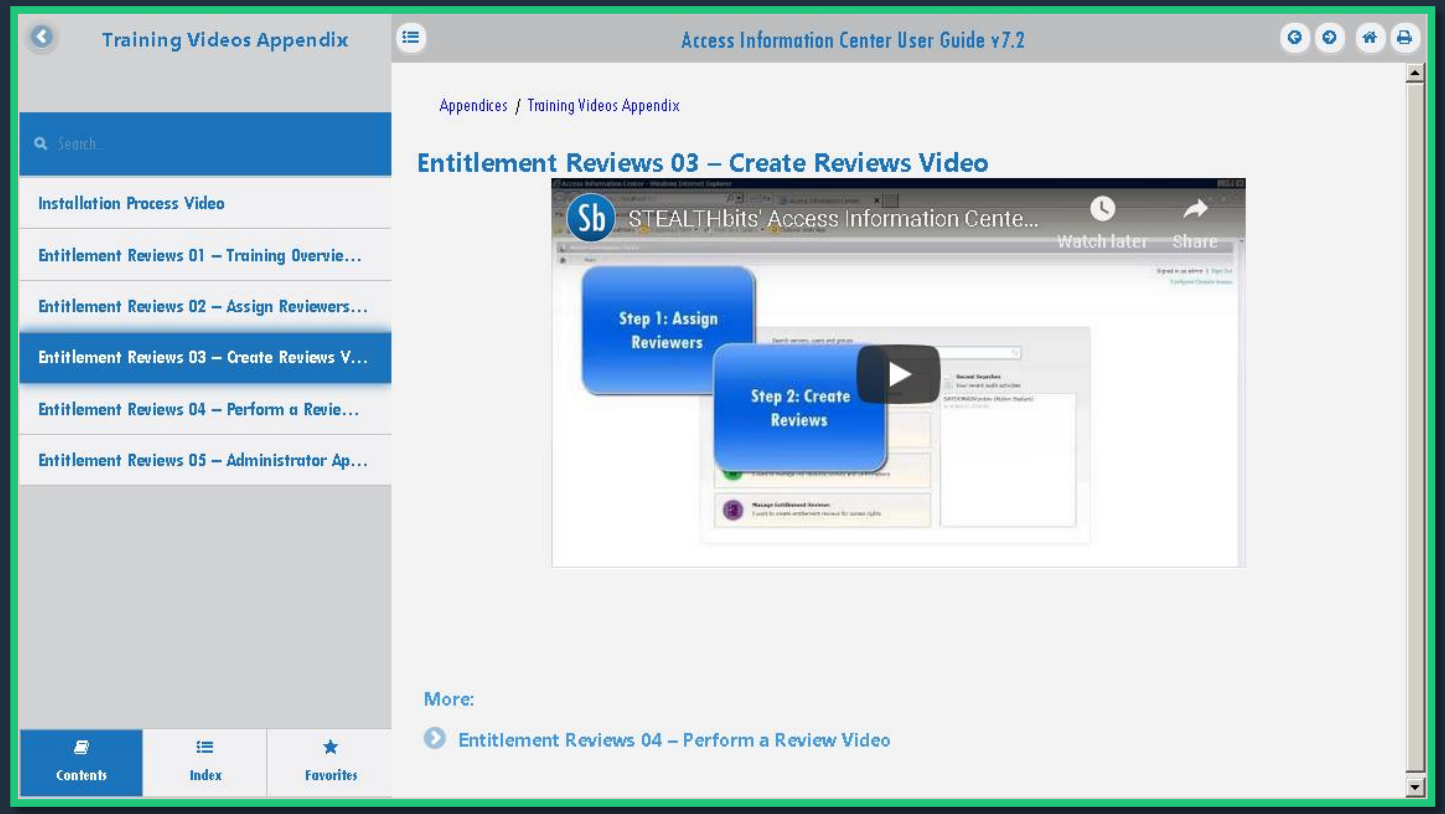
- Link between document sections in the same project
- Modify content to fit the output within a single source
- Apply conditional statement for various outputs





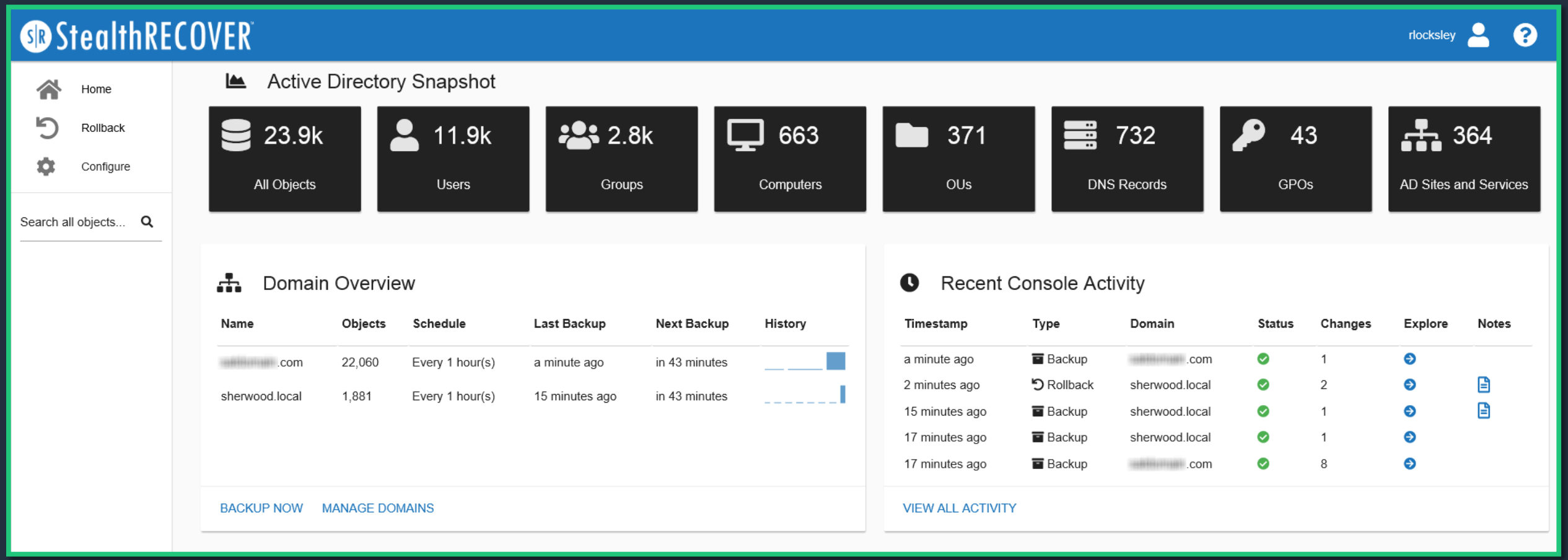
D2H MULTIMEDIA

- Embed training videos or animations
- Combine written & audio
- Entertain & inform



Sample Doc-To-Help Project

Meet the Software



The User Guide

Navigation

Search document

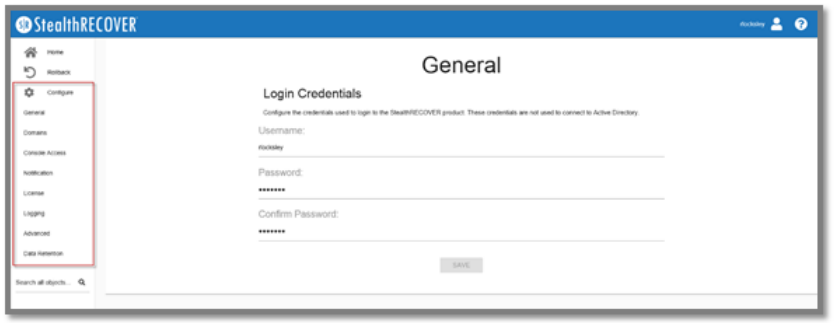
HEADINGS PAGES RESULTS

- Chapter 1: StealthRECOVER Overview
  - Navigating the StealthRECOVER Console
  - Console Icons
  - Session Timeout
- Chapter 2: StealthRECOVER Interfaces
  - Home Interface
    - Object Type Pages
    - Explore Specific Object
    - Restore Deleted Objects
  - Rollback Interface
    - Backup Now
    - Explore Backups
    - Perform Rollback
    - Warning Messages
  - Configure Interface
    - General
    - Domains
      - Add Domains
      - Modify Domain Information
      - Remove Domains
    - Console Access
      - Add User or Group
      - Add IP Address
      - Modify User or Group
      - Remove a User, Group, or IP Address
    - Notification
    - License
      - Update Product License
    - Logging
    - Advanced
    - Data Retention

Configure Interface

In the *Configure* interface, the StealthRECOVER settings can be modified. During the initial configuration process completed immediately after installation, the StealthRECOVER Admin account is configure (General), the Domains to be backed up are identified along with the corresponding service account (Domains), and the License file can be imported (License). See Chapter 3 of the *StealthRECOVER Installation & Configuration User Guide* for additional information.

Additional settings can be configured after the first backup: Active Directory accounts can be granted access to the StealthRECOVER Console (Console Access), email settings can be configured (Notification), logging levels can be adjusted (Logging), Active Directory attributes can be hidden from the Explore pages (Advanced Settings), and data retention periods can be adjusted (Data Retention).



Click **Configure** to expand the menu. Settings can be configured for:

- General – Modify the StealthRECOVER Admin account created during initial configuration

  NOTE: The credential configured here is only for accessing StealthRECOVER with the Admin account and is not related to Active Directory.

- Domains – Add or modify domains, service accounts, and backup schedules
- Console Access – Add users, groups, or IP Addresses to grant access to the StealthRECOVER Console
- Notification – Configure email settings to send alerts if a backup fails
- License – Update the organization's license file

Complexity

SR_UserGuide.docx - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW DEVELOPER Doc-To-Help Target Project

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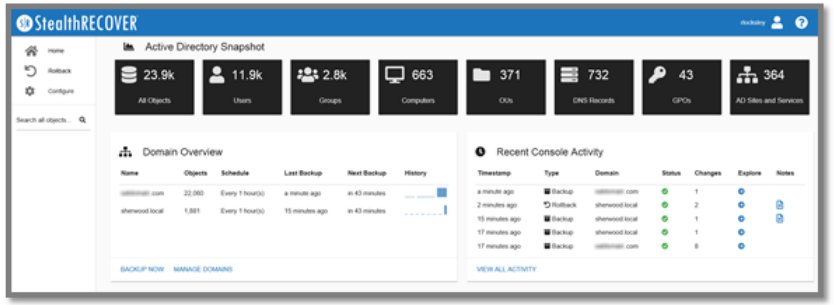
Home Interface

The *Home* interface displays a summary of the latest *Backups* and *Rollbacks* along with information on all successful backups.



The *Active Directory Snapshot* section shows counts per object(s) which are included in the most recent backup:

- *All Objects* – Total number of all objects currently backed up
- *Users* – Total number of user objects currently backed up
- *Groups* – Total number of group objects currently backed up
- *Computers* – Total number of computer objects currently backed up
- *OUs* – Total number of organizational units currently backed up
- *DNS* Records – Total number of DNS entries (A, CNAME, TXT, etc.) currently backed up

  NOTE: If DNS records are not stored in AD, the object count will show zero (or a low number). See Chapter 2 of the *StealthRECOVER Installation & Configuration User Guide* for additional information.See Chapter 2 of the *StealthRECOVER Installation & Configuration User Guide* for additional information.

- *GPOs* – Total number of Group Policy Objects currently backed up
- *AD Sites & Services* – Total number of Active Directory sites and services currently backed up

See the Object Type Pages section for additional information.

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D2H Features

SR_UserGuide.docx - Word

FILE | HOME | INSERT | DESIGN | PAGE LAYOUT | REFERENCES | MAILINGS | REVIEW | VIEW | DEVELOPER | Doc-To-Help | Target | Project

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Add | Rename | Delete — Topic

1 | 2 | 3 | 4 | Body Text — Headings

Link | Inline Text | Keyword | Group | LinkTag | Topic Properties | Conditional Text | Variable — D2HML Styles

Collapsible Section | Clear Formatting | Apply Style

Margin Note | Image Map Editor | Multimedia | HTML Help Control | Cross-reference — Links

Add Terms | Sort — Glossary

About — Help

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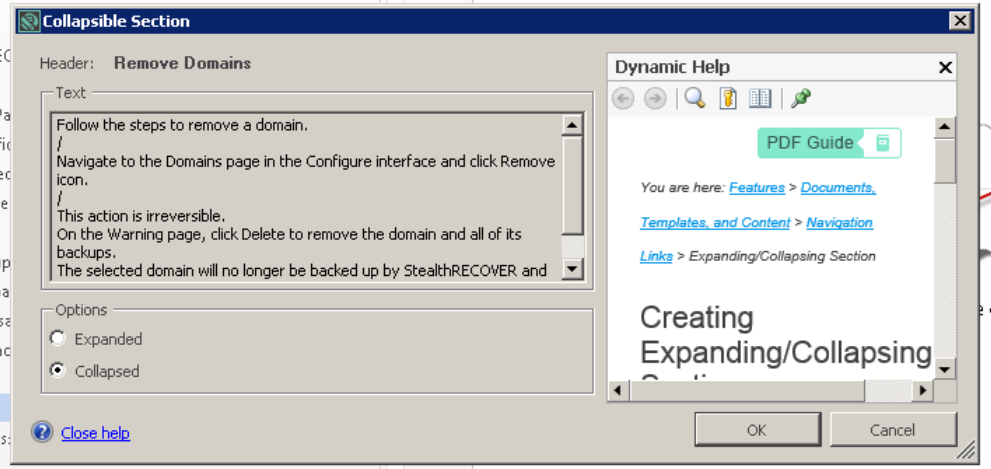
    - Notification
    - License
    - Logging
    - Advanced
    - Data Retention
  - Search Interface
- Chapter 3: StealthRECOVER Use Case Examples
  - Recover a Deleted Object
  - Rollback Changes to an Object
  - Rollback Attribute Changes
  - Rollback DNS Record Changes
  - Rollback Group Policy Object Changes
  - Rollback Changes to Sites, Subnets, or Services
- Appendix: Release Notes



Step 5 – On the Confirm page, click **Confirm** to save the new settings.

The modified domain information appears in the *Domains Configuration* table.

Configure interface and click **Remove** icon.

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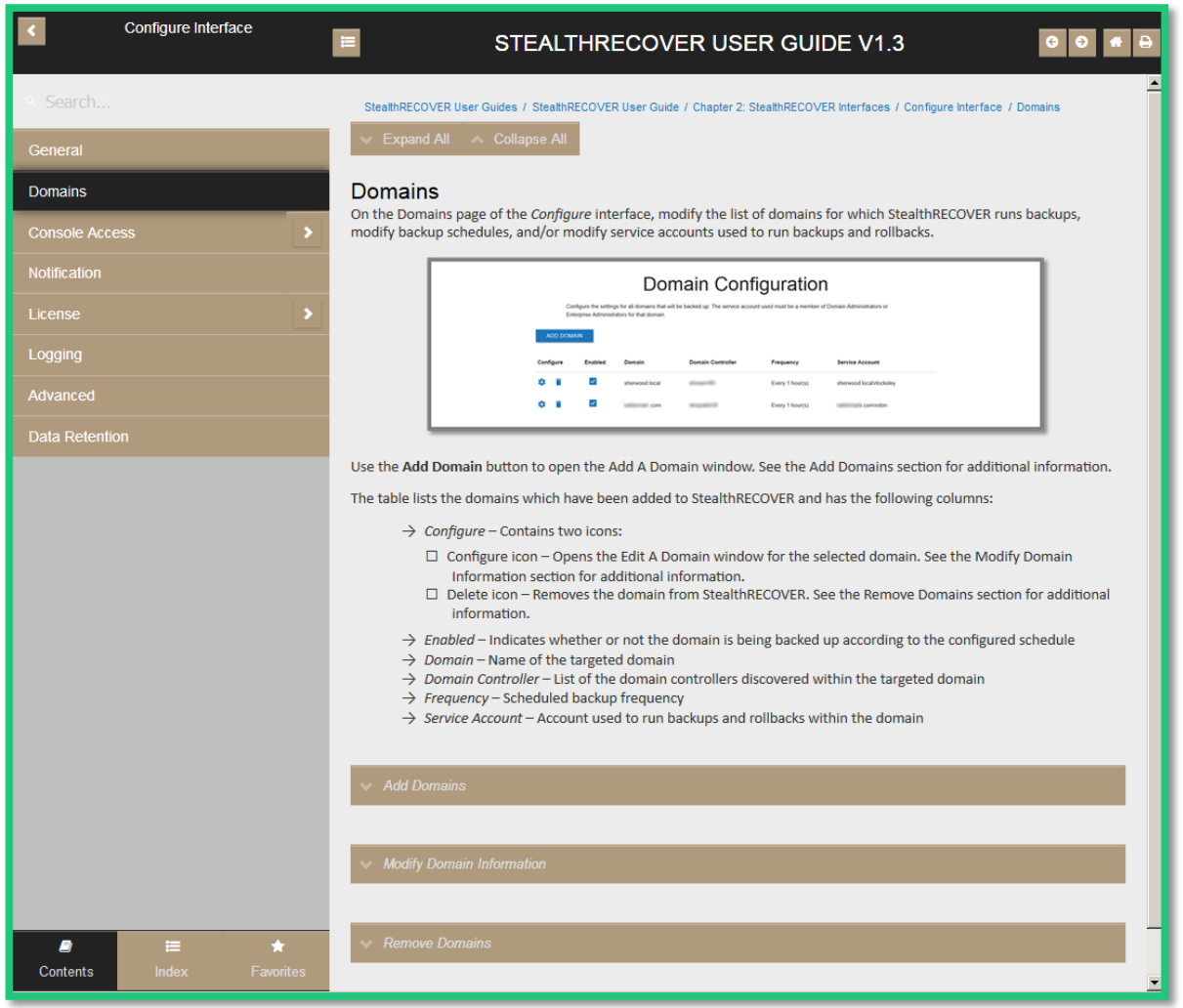
D2H FINISHING TOUCHES

- Related topics
- Inter-document links between the install guide and the user guide
- Custom Table of Contents



Questions & Answers

Thank You!

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