LIVE WEBINAR

Why Documenting Your Project is Crucial to Staying Organized - Part 2

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LIVE WEBINAR

Before We Get Started...

The webinar will be recorded and emailed to all registrants

Use the Question Panel in GoToWebinar to ask questions throughout the webinar

Information Types

- Goals:
  - Identify the types of topics you write to ensure consistency of content.
  - Define standard structures and styles for topics to help creating templates and CSSs.

Information Types

- Lists and describes all information types, with examples:
    - Concept – “What is…?”
    - Reference – More specific concept topics.
    - Procedure/task – “How do I…”
    - Context–sensitive – Screen or object level.
    - Others…

Information Type Structures

- Describe a standard structure for each type:
  - Required and optional head levels.
  - Required and optional notes, cautions, etc.
  - Tables.
  - Graphic insertion options and special effects like thumbnailing.
  - Others…

Information Types

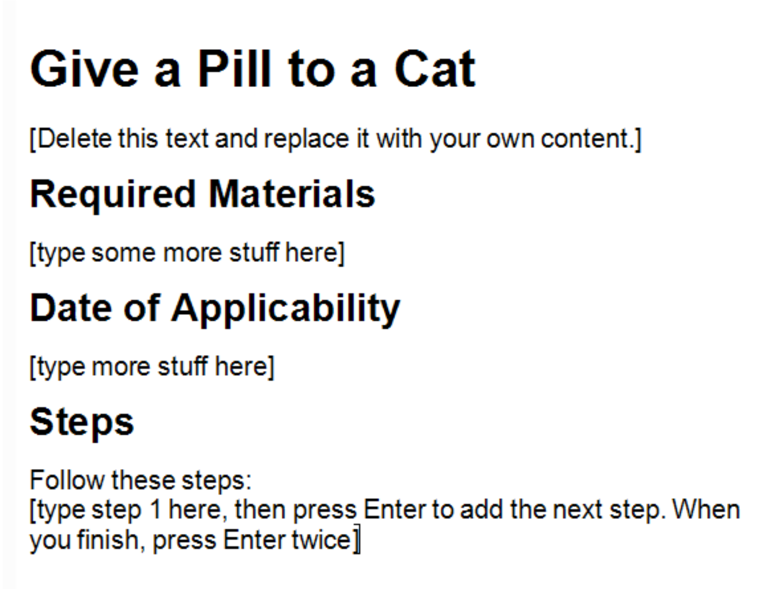
- Lists any re–usable objects:
  - Externally called files.
  - CSSs.
  - Variables.
  - Snippets.
  - Others…

Information Type Structures

- Why describe the standard structures:
  - Help authors select the type for a new topic.
  - Help authors control the new topic structure.
  - Designate the styles to define in a CSS and table CSS.
  - Designate what styles to make dynamic for use in responsive layout.

Information Type Structures

- Here’s a sample task template:



Give a Pill to a Cat

[Delete this text and replace it with your own content.]

Required Materials

[type some more stuff here]

Date of Applicability

[type more stuff here]

Steps

Follow these steps:
[type step 1 here, then press Enter to add the next step. When you finish, press Enter twice]

Information Type Structures

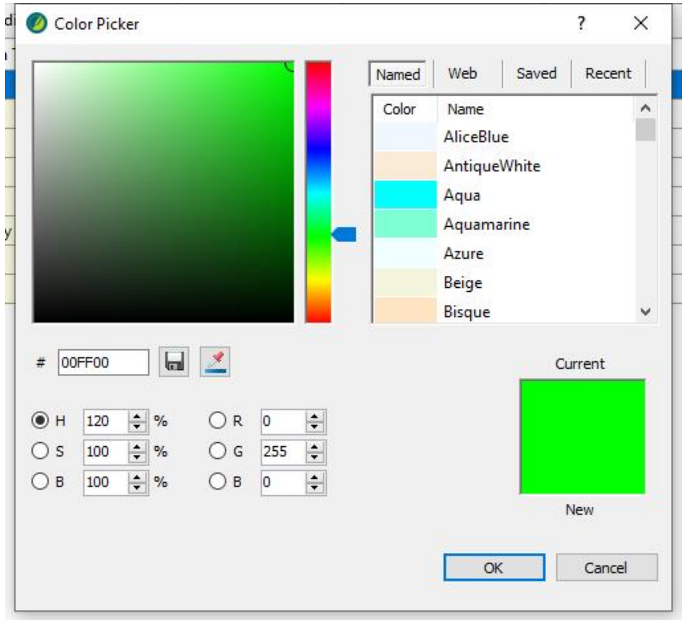
- You can add templates to the Flare interface for use when creating new topics – Tools/Manage Templates.

Conditionality

- Goal – To keep conditions under control.
- Crucial – Messed-up conditions is a common reason for a project to go out of control.
- List:
  - When to apply them and what status to set – include or exclude.
  - What formulas to use to call them.
  - What formulas to use if you're using the Advanced option.

Conditionality

- More…
  - Color selection when male authors are present.
  - Considerations for color–blind authors.



Color Picker

# 00FF00

● H 120 %
○ S 100 %
○ B 100 %

○ R 0
○ G 255
○ B 0

Access

- Goal – Define how users will know that help is available and how to access it.
    - Online book – How it opens (desktop icon?).
    - Application help – Screen vs. object–level.
        - How to invoke help for each approach.
        - For object–level web–based help, how to show on the interface that help is available.
        - Hard to show presence of help at the field level without cluttering the interface.

Access

- If the help opens off the Help menu.
- Whether the help is local or web–based
- Who provides map IDs (authors or IT).
- If IT, name and contact info.
- What the actual codes look like.
- Explanation of the header and alias files and how to use Flare’s Alias editor.

Navigation

- Goals – List the user navigation features to:
    - Provide simple and consistent interfaces.
    - Consider how features will work in different formats, esp. online to mobile and/or print.

Navigation

- Describe and prescribe:
    - Hyperlinks vs. xrefs (why and when).
    - Popups (full vs. text–only).
    - Contents, Index, Search tabs (in top– and side–nav vs. tri–pane windows).
    - Search filters.
    - Glossary tab (or “hidden” glossary).
    - Other

Graphics Specifications

- Goal – To ensure consistent graphic formats, sizes, and effects.
- Lists all graphic specifications:
    - Valid types (screens, line art, photos, etc.).
    - Formats – GIF, JPG, or PNG.
    - Sizes – To allow a small number of IMG sub–classes in the CSS.
    - Local formatting vs. IMG or IMG sub-class settings in the CSS.
    - Graphics tools, versions, and settings.

Multimedia Specifications

- Goal – To ensure consistent multimedia formats, types, access, and effects.
- Lists all specs for audio, video, animation, VR, QR codes, etc.

Interface Design

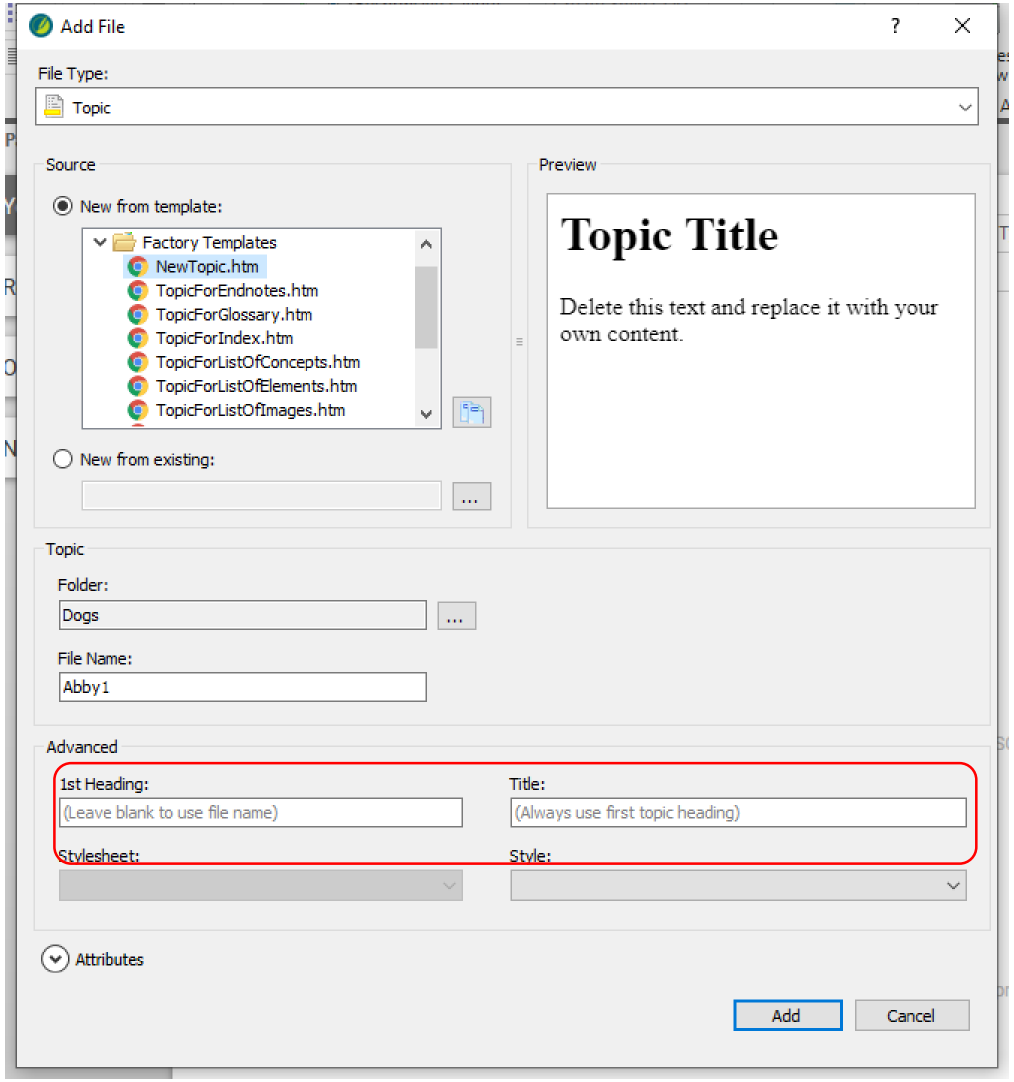
- Goals – To ensure:
  - An effective, consistent, and easy–to–use interface.
  - A maintainable interface.

Interface Design

- List:
  - For one project, all settings for the interface features.
  - For multiple or cross–department projects, all settings for each project team.
    - Required vs. optional settings.
    - Shared settings vs. individual project settings.

Interface Design

- Settings to document *include*:
  - Project template name and location.
  - CSS file(s) names.
    - Give Flare’s styles.css a project–specific name.
  - Basic project settings like:
    - Title.
    - Copyright information.
    - Whether to add the <title> for a topic (for SEO purposes).



Add File

File Type: Topic

Source

● New from template:

- Factory Templates
  - NewTopic.htm
  - TopicForEndnotes.htm
  - TopicForGlossary.htm
  - TopicForIndex.htm
  - TopicForListOfConcepts.htm
  - TopicForListOfElements.htm
  - TopicForListOfImages.htm

○ New from existing:

Preview

Topic Title

Delete this text and replace it with your own content.

Topic

Folder: Dogs

File Name: Abby1

Advanced

1st Heading: (Leave blank to use file name)

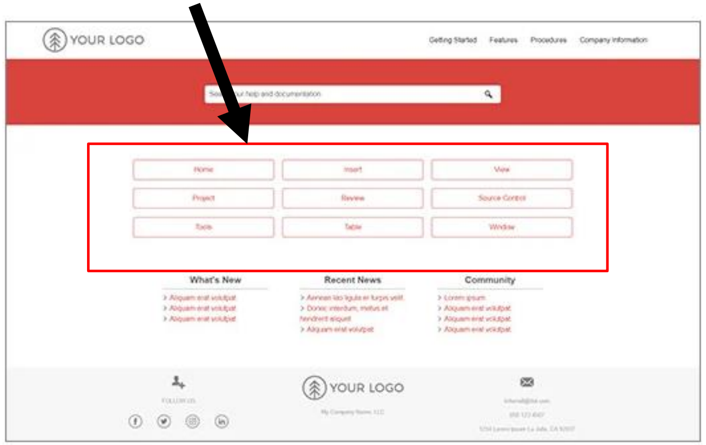
Title: (Always use first topic heading)

Stylesheet:

Style:

Interface Design

- Window attributes:
  - Contents.
  - How to set colors, fonts, etc., in control files.
  - How to add or modify tiles.
  - Other attributes.



Interface Design

- Table attributes.
    - Set in the table CSS.
    - If multiple table styles (and CSSs), whether to use the automatic application feature.

Interface Design

- Naming conventions for:
  - Folders.
  - Images.
  - Concept links.
  - Snippets and variables.
  - Conditions.
  - Multi-word file names – spaces, underscores, hyphens, etc.
    - Ask Engineering.

Interface Design

- Search/SEO attributes.
- Other, underlying information.

Authoring Tool Specs

- Goals:
  - Standardize the authoring environment across departments.
  - Provide a tool history.
- Lists all authoring tools and versions, including those that predate the adoption of Flare.

Authoring Procedures – Error Control

- Goal – To avoid reinventing the past with each new project or author.
- Lists common errors and their solutions.
    - “Obvious” errors that aren’t if you’re new.
    - Treat this information as the gold it is.
        - Put it in a standard format.
        - Store it in an easily accessible location.
        - Update and back it up periodically.

Authoring Procedures – Clean-Up

- Delete unused files or put them in a “files I’m scared to delete” folder.
- If using a parent/child structure, be aware that a file or setting that’s not used in your child project may be used in another – be cautious about deleting files or settings.

Authoring Procedures – Record Keeping

- Lists the records to retain at the end of a project and where to hold them.
- Should include:
  - The completed and updated project spec.
  - Appropriate reports from Flare, Central, etc.

Authoring Statistics

- Track authoring statistics to set standards for future projects.
- What to track:
  - Time (hours) to write one page of content.
  - Time (minutes) to create topic-specific items per topic.
  - Time (minutes) to create non-topic-specific items per topic.
- Be prepared for political resistance.

Online Writing Style Guide

- Goal – Focus on issues of writing for online or single sourcing rather than in general.
- Should not be a “true” style guide unless there is none to begin with.
- This section should:
  - Refer to any existing style guide.
  - Look at issues related to writing for different online formats, such as “click” vs. “tap” for desktop vs. mobile presentation.

Conversion Steps – Hard–Copy

- Goal – Create a “cookbook” conversion process.
- Lists the settings for output to hard–copy targets.
- It should detail thinks like:
  - Creating dynamic page layouts (and heads).
  - Using heading sub–classes to close up white space between topics – h1 and h1_nopagebrk.
  - Dealing with footnotes.

Tips and Tricks

- For example:
  - Creating a topic outline in Word or Excel vs. using the project's Contents tab as the outline.
  - But consider:
    - An outline lists all topics but a Contents tab rarely lists popups or CSH topics.
    - Removing these topics from a Contents tab list ruins the outline.
- Other…

Political Issues

Flexibility

- Goal – Remember that there’s an exception to every rule and ensure flexibility.
  1 Add a standard deviation procedure.
    - Define it in the spec.

  2 Make it clear that authors do not have to subordinate the material to the design.
    - State this in the spec.
    - Make this clear in the atmosphere around the spec.

Organizational Support

- Goal – Ensure organizational buy–in.
- All groups affected by the spec must have a voice in its development and maintenance.

Realism and Political Posturing

- Goal – Create outputs that support products, not chase awards.
- Two common problems:
    - Ego – Adding cool features for professional growth (and awards) even though they’re not needed and even detract from usability.
        - But simplicity can seem boring.
        - Stress the challenge of simplicity.

Realism and Political Posturing

- Posturing – Demanding “a bold leap” to get a reputation as a visionary, even if the “leap” is unnecessary or impractical.
    - “Bold leap” demands often come from politicians who usually escape fallout.
    - Common on high–visibility projects.
    - Build support horizontally across the organization and vertically in management and be able to justify all your decisions.

The New Philosophy

~~“There’s never enough time to do it right, but we hope to have time to go back and fix it later.”~~

“Do it right the first time.”

Questions?

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Thank You