
Your Secret Weapon: The Documentation Bible

PRESENTED BY

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About Me

- Senior Technical Writer at MadCap
- 9 years in software industry
 - 6 as a technical writer – all using Flare!
 - 2+ years at MadCap!!!





MADWORLD

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- Outdated training manuals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

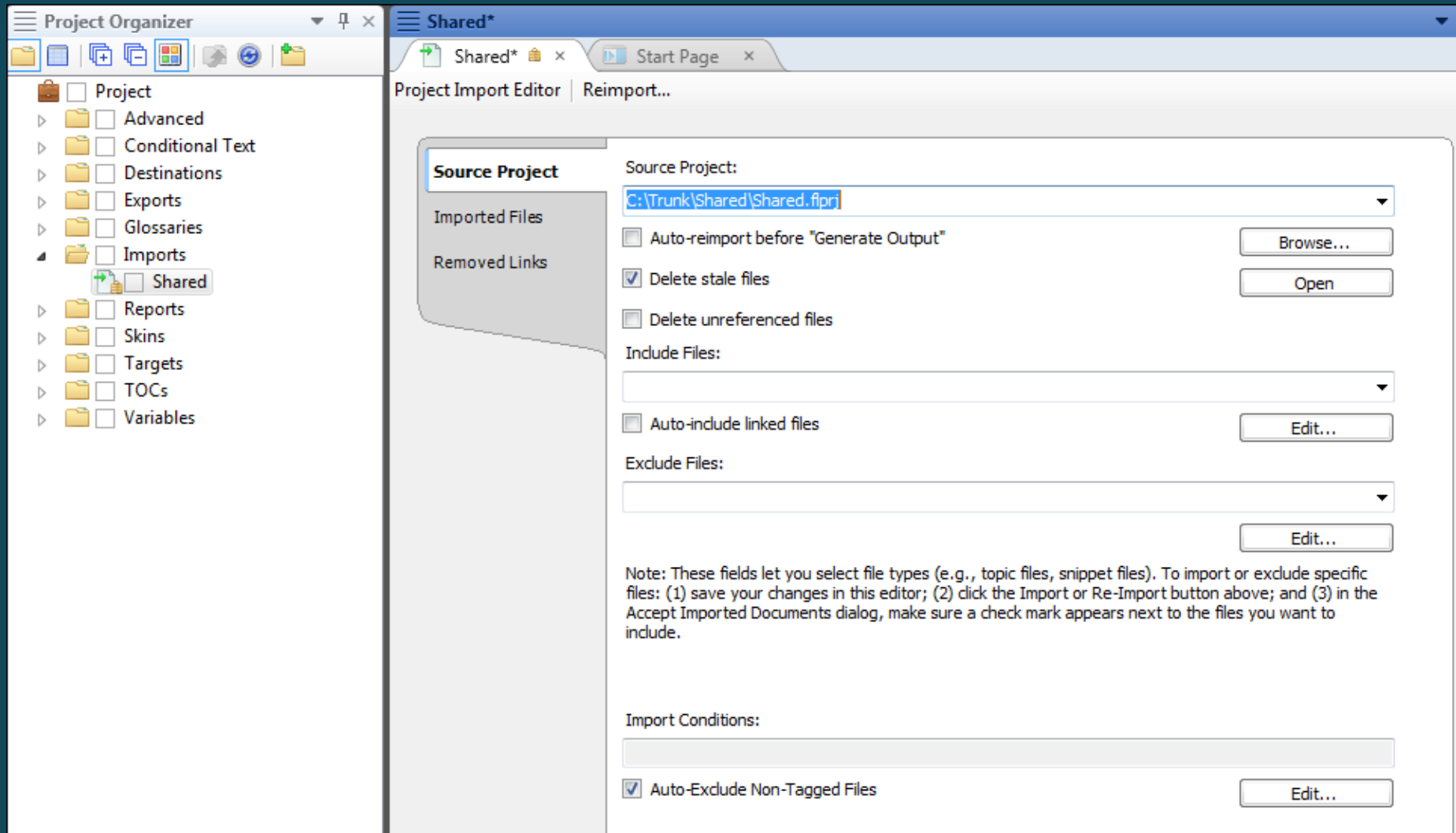
- Your actual Help project
- Copy of a published style guide (e.g., *Chicago*)
- Flare Help

Creating the Doc Bible

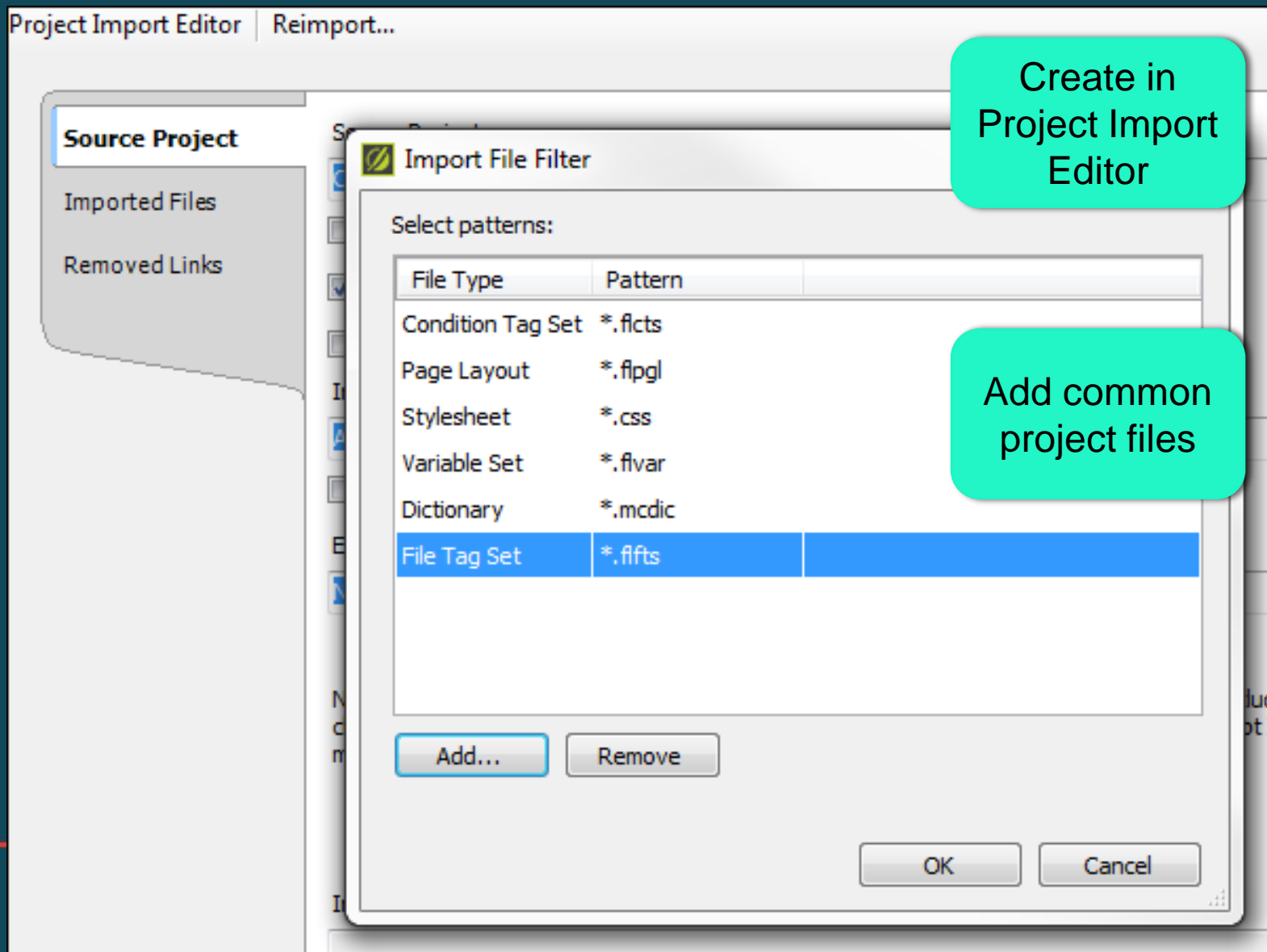
- Set it up like your main Help project
 - Global Project Linking: conditions, styles, page layouts, snippets



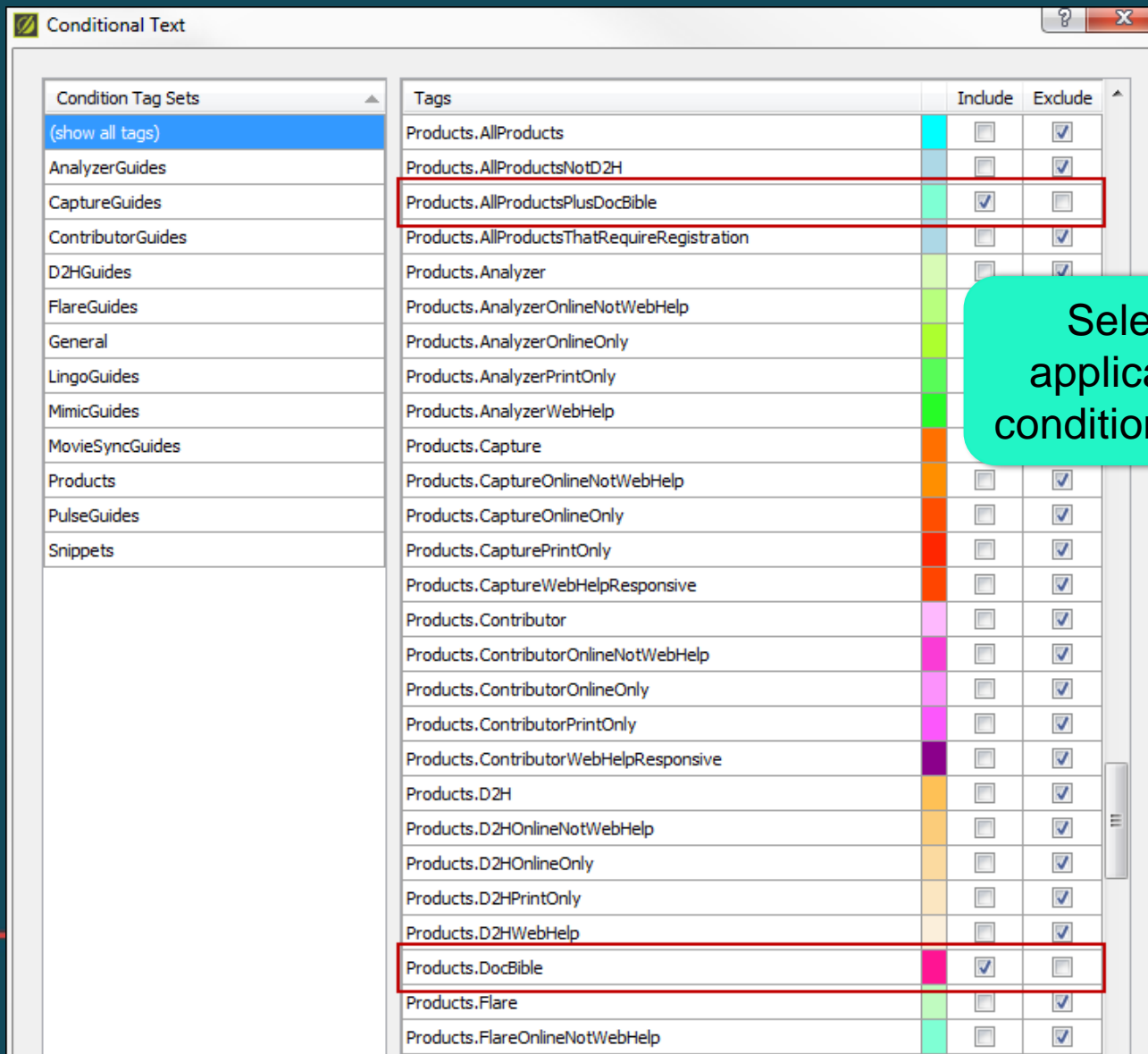
Example: Global Project Linking



Example: Global Project Linking



Example: Global Project Linking



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 AUTHORIZING IN THE DOCUMENTATION BIBLE
- ▶ DO NOT MODIFY CONTENT IN THE SHARED PROJECT UNTIL ASSIGNED TO DO SO

Getting Started

About the Documentation Bible

Team and Company Basics

Research & Development

Documentation Procedures

Software Procedures

Style Guide

To Do

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.



Example: How-To Topic

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 object 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.

Palette Name	Details
Callouts	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.

Mimic

Does not rewrite
Mimic Help

Selecting a Recording Mode

Gives
information
about how our
team uses
palettes

Example: How-To Topic

How Do We Use Notations?

Our team uses a variety of notations throughout our documentation and even the table below to learn more:

Notation Type	Applied Via	
Emphasis	CSS	<p>See Emphasis.</p> <p>EXAMPLE</p> <p>» 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.</p> <p>» 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.</p>
Examples	CSS	<p>See Examples.</p> <p>EXAMPLE</p> <p>This is example text.</p>

Topics look just like topics in Flare's help: conditions, drop-downs, styles, etc.

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.

For more features like this, go to [MadCap Software](#), you can find the appropriate marker in the topic and the marker is an area. Then, right-click the marker and select [Style Change](#) (Name of Style).

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.

How our team
uses punctuation

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](#).

Noting a
common error



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

☑ **LEARN HOW TO WORK WITH SNIPPETS**

To learn how to work with snippets:

- » **Read the Online Help** - Search for Snippets in the Flare online documentation:
<http://www.madcapsoftware.com/support/onlinehelp.aspx>
[MadCapOnline
Update:
<http://www.madcapsoftware.com/support/onlinehelp.aspx>
- » **Search the Knowledge Base** Visit the MadCap Knowledge Base at: [MadCapKnowl
edgeBase:
<http://kb.madcapsoftware.com/>
~~<http://kb.madcapsoftware.com/>~~
- » **Go to User Forums** Visit the user forms at:
[MadCapUserF
orums:
<http://forums.madcapsoftware.com/>
~~<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 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

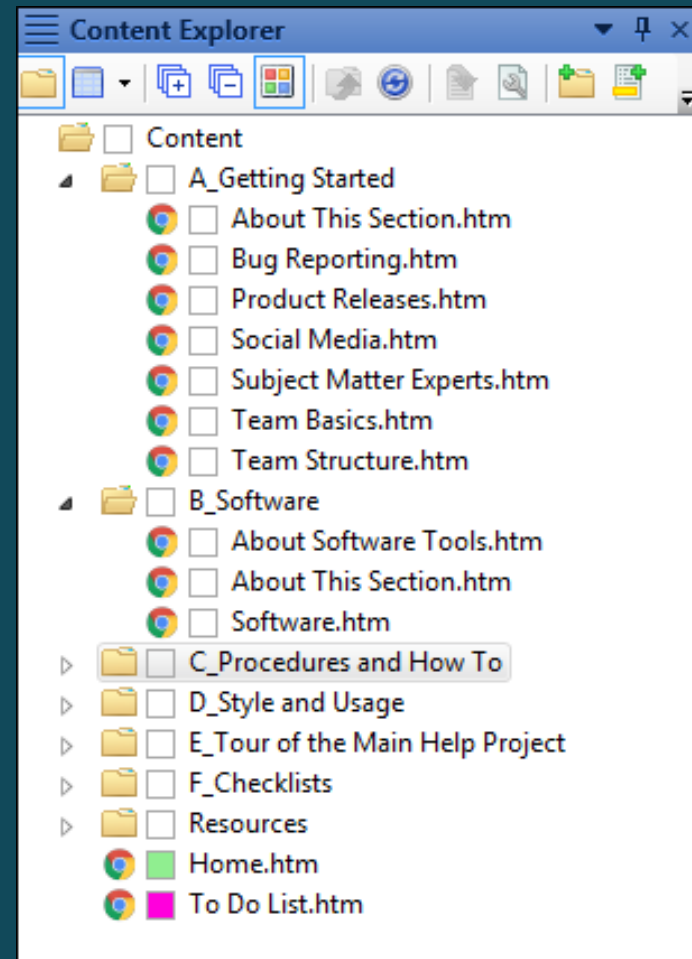
DON'T...

- Neglect the DB!
- Try to document everything on Day One
- Rewrite existing documentation

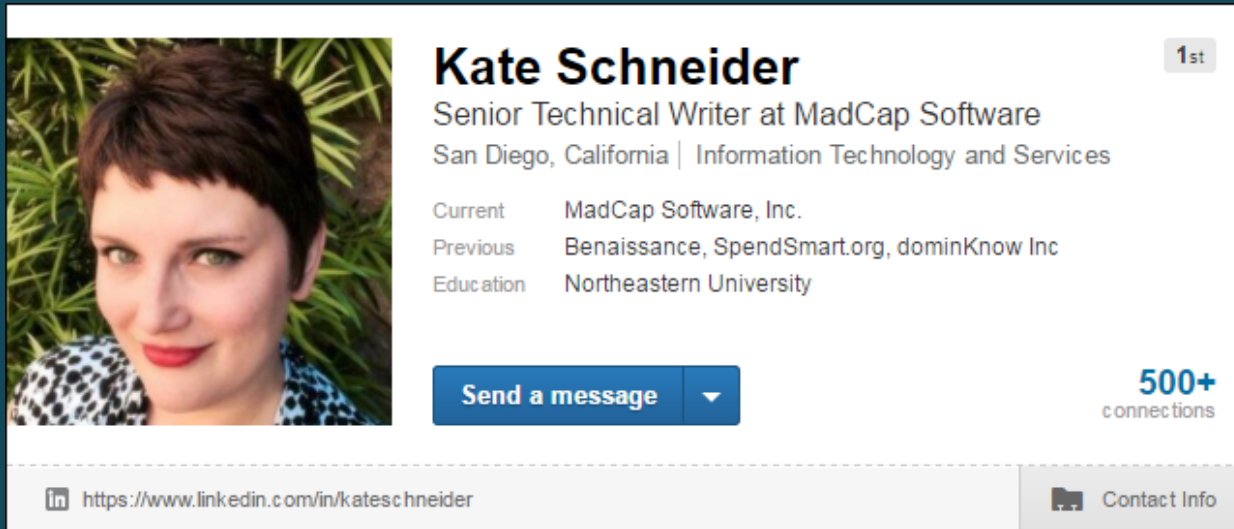


Sample Doc Bible Project

- 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!



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