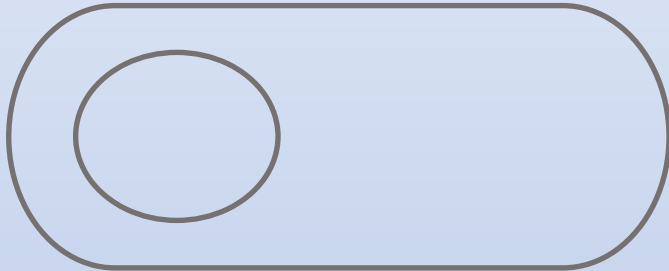


HTML



PDF



Taking documentation from
00 to 10

Building HTML-based documentation from an
infrastructure of PDF files

Ken Davies



Is modernised
documentation like
a modern city?

The state of file and folders
in the world of PDFs



Docs



Product



Phase 1



User Guide



Ace UserGuide
US Version



Ace UserGuide
UK Version



Marketing



User Guide



Draft



Ace UserGuide
US Version



Development



Release



R1.1



US Version



Ace UserGuide



UK Version



Ace UserGuide



R1.2



Ace API



R1.2 Patch



Ace API

<part 1>Understanding the problem</part 1>

<part 2>Building content</part 2>

<part 3>Developing processes</part 3>

Background

- Pioneers in recruitment software since the 1980s
- Cloud and on-premise solutions
- Established help desk and training teams
- Microdec PLC is now part of the Access Group
- 2016 released a modernised dashboard interface [enter online help](#)

Business Case for Online Help

- Modernise technical communication
- Reduce costs from maintenance
- Save the environment
- Modernise training
- Up-to-date user experience – we all use the web
- **But also** better quality information

All documentation was in PDF
and there were many modules,
releases, spanning over 2
decades

Rewrite needed to create
content based on user needs

Lack of clarity: so many questions



Publishing in HTML and PDFs compared

PDF files are generated from Word with embedded images

PDF files are portable

PDF files are self-contained

Output is a website

Files published to a location

Can separate internal and external pages through different site content

Testing different systems

	Confluence	Help and Manual	MadCap Flare	Robohelp	Telerik Editor
Rich HTML Content	✓	✓	✓	✓	✓
Content Reuse			✓	✓	✓
Word integration		✓	✓	✓	
Affordable		✓	✓		✓

<part 1>Understanding the problem </part 1>

<part 2>**Building content**</part 2>

<part 3>Developing processes</part 3>

Balancing customer feedback and coming up with own ideas to develop information

What does the customer want?



What do we want to communicate?

Attended training courses
to learn about the product and to build customer
knowledge



LONDON
9 623 KM

NEW YORK
12 541 KM

Navigation challenges

Considerations on taxonomy

Reference

A
B
C

Step-by-step

1
2
3

Common tasks

B
A
C

Manual vs help basic design

PDF Collection	HTML collection
User guide	Consultant Pages Topic Topic Topic
System admin manual	System admin pages Topic Topic Topic

Writing for the web is
different

Introduction and conclusion

Basic information

Extra
details

What is a QR code
and why it's useful?

How you use QR Codes?
Where do you use them?

Tips on creating QR codes
History of QR codes

One page multiple audiences

Fill in the Patient Form

Enter as much detail as possible about the patient.

Before you enter details, the system looks for an existing patient in the database. If it finds details, it compiles a report based on the information it has.

[\(Want to know more about the report?\)](#)

Enter Basic Details

1. Enter the patient's Full Name.
2. Enter their Date of Birth.

Fill in the Patient Form

Enter as much detail as possible about the patient.

Before you enter details, the system looks for an existing patient in the database. If it finds details, it compiles a report based on the information it has.

[\(Want to know more about the report?\)](#)

The report is automatically generated and shows:

- Full Name
- Gender
- Age
- Body mass index
- Blood pressure
- Medical history

Various charts are included in the report.

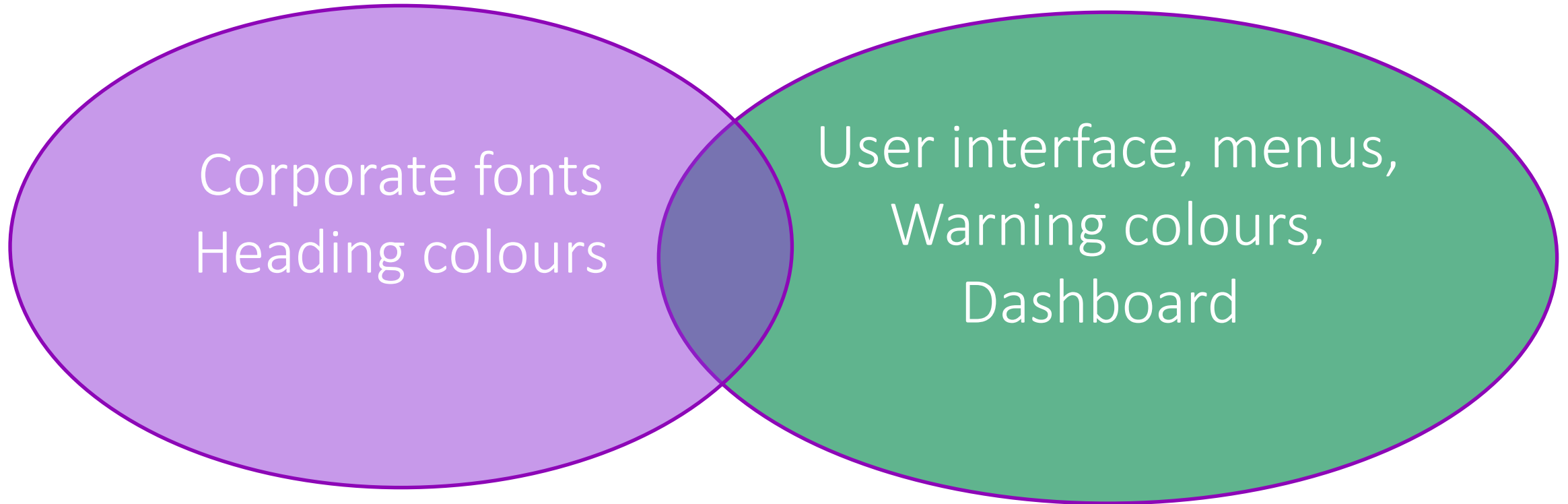
Enter Basic Details

1. Enter the patient's Full Name.
2. Enter their Date of Birth.

Colour conventions

- What works for print doesn't always work for the web
- Corporate colour conventions vs product colour conventions
- Product colour conventions considerations (does green mean "go-ahead")
- Complementary colour conventions
- Enter CSS

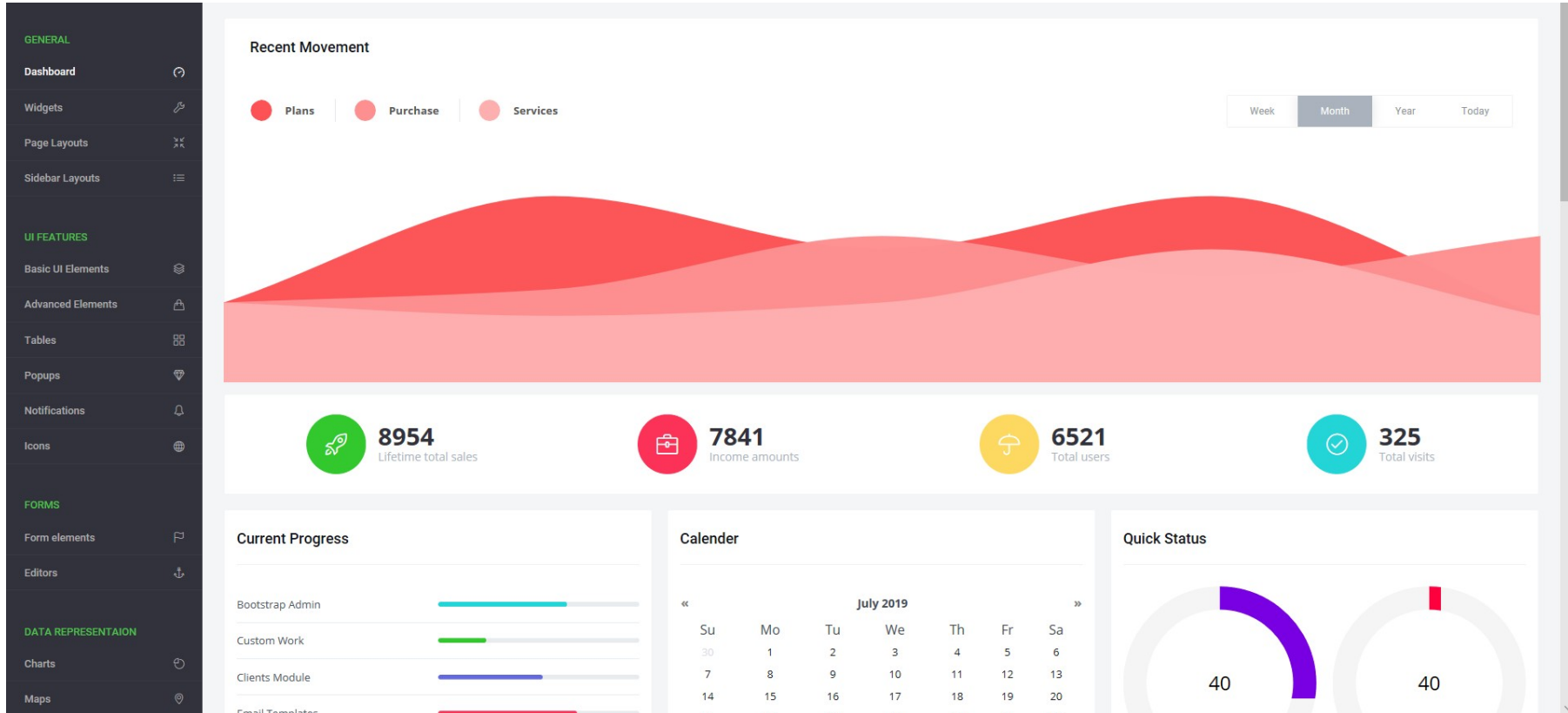
CSS bridges together



HTML presents the
opportunity to put
documentation directly into
the product

Enter microcopy

Short reusable content and
headlines



View performance through autogenerated charts and graphs.

Filter by day, week, month, and year.

See [more](#)



Turn off microcopy?

Content reuse essential for
large amounts of content

What is good about reuse?

- Allows the content to be written once
- Minimises review times
- Allows users to find out more information from one page

Instructions on filling out a form

Applicant.htm

1. Enter passport #
2. Enter Full Name
3. Enter Nationality

No: National insurance

Reusable Text Snippet

1. Enter passport #
2. Enter Full Name
3. Enter Nationality

Conditions

Yes: National insurance

No: National insurance

Consultant.htm

1. Enter passport #
2. Enter Full Name
3. Enter Nationality

Yes: National insurance

Member.htm

1. Enter passport #
2. Enter Full Name
3. Enter Nationality

No: National insurance

Content Reuse is challenging to implement if you don't know the software enough or are looking for simple ways of explaining the technology

EPPO Topics

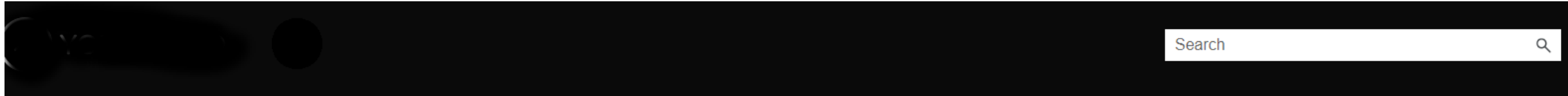
When a user lands on a page via a search engine they are on page one – they don't care about the rest of the site.

A close-up photograph of a red squirrel sitting on the ground in a grassy area. The squirrel is facing right and is holding a nut in its paws, appearing to be eating it. The squirrel's fur is a vibrant reddish-brown color. The background is filled with green grass and large green leaves, some of which are slightly out of focus. The lighting is bright, suggesting a sunny day.

We are like
foraging
animals on
the web

What are the characteristics of an EPPO topic?

- Self-contained
- Specific and limited purpose
- Conform to type
- Establish context
- Assume the reader is qualified
- Stay on one level
- Link richly



Installation

Map Views

Search

Routes

Weather

City Tour

Advanced: Voice Commands

Troubleshooting

MapUniversal in the Car

MapUniversal is an essential device for allowing you to get to your destination via the fastest route. To make your journey truly fab, you can also enjoy a virtual city tour of your destination and an up-to-date weather report. It can be used in any modern car.

Start by installing the device in your car.

Which Manufacturers?

Click on the [link](#) to find a list of manufacturers that allow you to use the app.

Connecting via Your Phone

You can connect to MapUniversal via any Android using iOS phone over a Bluetooth connection.

Safety

Ensure that you abide by the safety laws for using devices in vehicles as applicable to your country.

Scheduling **let alone writing**
is difficult if you don't know
about the product

A large part of rewriting the docs
is taking an exploratory approach
to knowing the product

What's the most important feature?
How long would it take to write
the guide?



<part 1>Understanding the problem </part 1>

<part 2>Building content</part 2>

<part 3>**Developing processes**</part 3>

Putting structures in place around exploratory writing

- Become the undercover QA
- Think about what features are key to me (the pretend user)
- Arrange a demo
- Create test cases
- Alter the documentation structure

Transform to EPPPO topics

- Alter headings to be user centric
- Add a See Also or Related Topics section to each topic
- Add in search tags to all heading levels
- Make adjustments to the navigation menu

Maintain reusable content

- Check if each reusable item is added correctly
- Add new reusable content
- If adds bloat **remove**

Reviews are **essential** and
ongoing can be on **content** and
look-and-feel

Build an Agile process

Agile process requirements

- Ongoing document development process
- Prioritise tasks
- Manage reviews
- Gracefully start and complete tasks

Enter kanban

Help Files

+ Add a new task

Project Settings

Feedback 0 Task Board 18 Archive

ASSIGNED: I ASSIGNED: steve.williams@microdec.com

Members edit

- Review 1
- Author
- Reviewer 3
- Reviewer 2

Guests edit

Tags

- Software company 1/1
- table 4/4
- menu 5/5
- Redmine 1/1
- word 1/1
- Incorrect information 55/55
- Unnecessary 70/70
- punctuation 4/4
- Typo 4/4
- Search 2/2
- mi 1/1
- Links 5/5
- SNIPPET 33/33
- Duplication 7/7
- Missing information 56/56
- Confusing 2/2

BACKLOG 9

TODO 0

DOING 8

DONE 1

Sort by

- #471 worked example guide
- #480 add standardised icons
- #481 code reference
- #465 API pages
- #477 front end component description
- #478 bespoke deployment instructions
- #468 text translation
- #475 configuration troubleshooting

- #719 feed management module
22 Feb 2019
- #349 add standardised icons
Organisation
- #479
- #714 amend login screenshot with new colours
- #106 describe Y and N settings in confirmation db
18 Apr 2019
Diagrams, Recruitment ...
- #118 System enhancement details
18 Apr 2019
Wording, Recruitment ...
- #75 "...typing in Acme Can finds Acme Candidate if

#732 "The app remind you of the sales figures"

Should be:

"The app reminds you of the sales figures"

spelling

TASK DETAILS View fullscreen

719 doing 5 months ago

Short procedure to describe this simple module.

mark as done

SEVERITY not set

ASSIGNED TO Author

REPORTED BY Author

TAGS

DUE DATE 22 Feb 2019

ATTACHMENTS attach file

ADDITIONAL INFO show details

COMMENTS view log

Add a comment

Author | Feb 28 at 11:33am

The feed management module is a useful feature that allows users to customise their own feeds from different sites. There are many other ways of customisation besides feeds. This is a definite nice-to-have.

Plan for each release to keep
up with development

Comparing release tasks

LOW DOC TASK
HI DEV TASK

Short description

Security fixes
Enhancements

HI DOC TASK
HI DEV TASK

Product pages
Release notes

UI Revamp
New architecture

Dependency
No-dependency

LOW DOC TASK
LOW DEV TASK

Web Page Redesign

Code Refactoring

HI DOC TASK
LOW DEV TASK

Product pages
New API guides

New app feature

Alter the look-and-feel incrementally

- Make periodic changes to the look-and-feel
- Use standardised icons, e.g., font awesome
- Easily point to these on the web rather than download locally

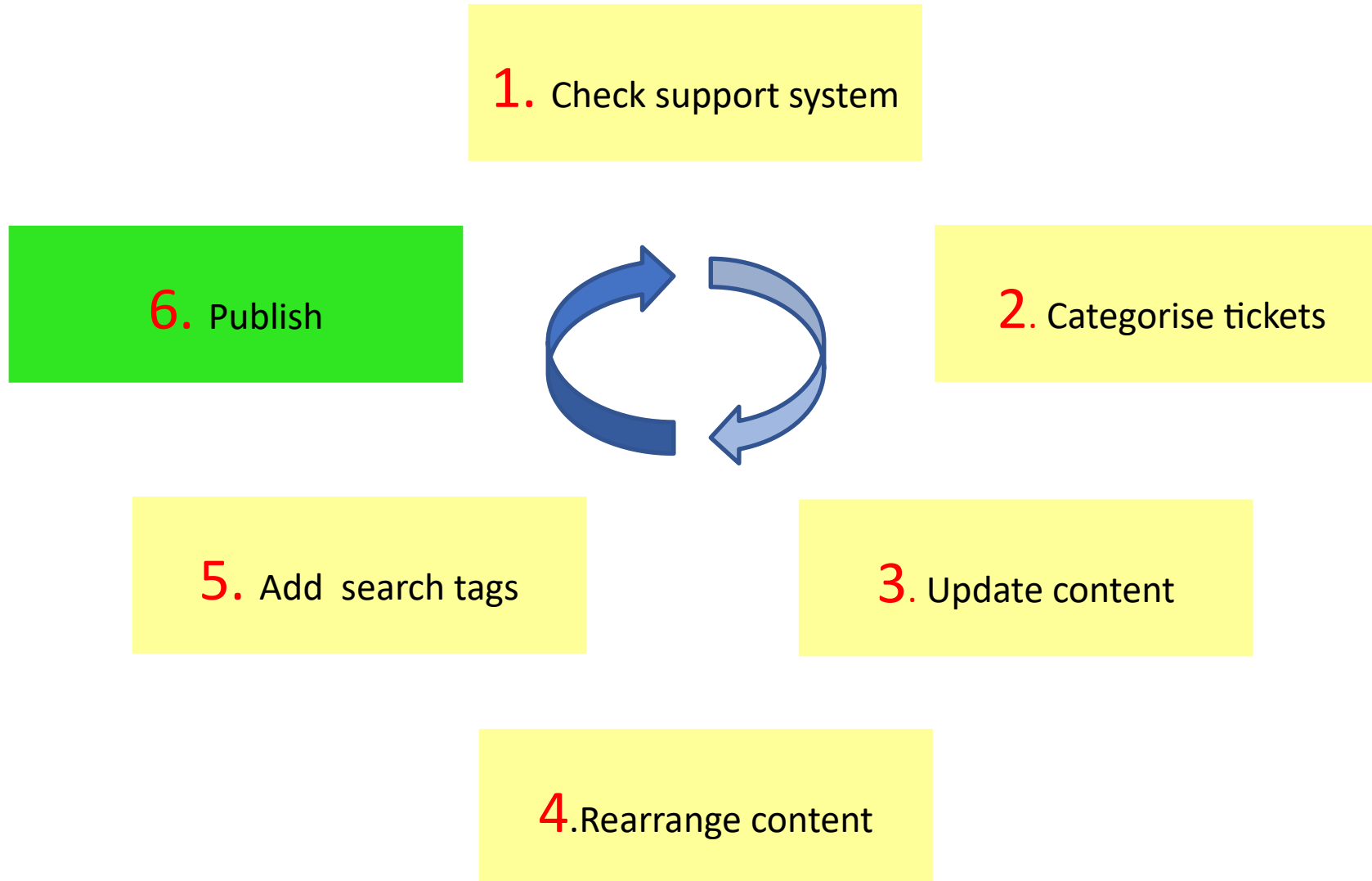
Tip:

You can select multiple items by holding down the Ctrl key.



You can select multiple items by holding down the Ctrl key.

Monitor support tickets to boost customer focus



Are customers using the help?

- Google Analytics is a key ally
- GA not possible with PDFs alone
- Large number of hits show popular topics



Was there a new
city?

Thanks for listening!

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