

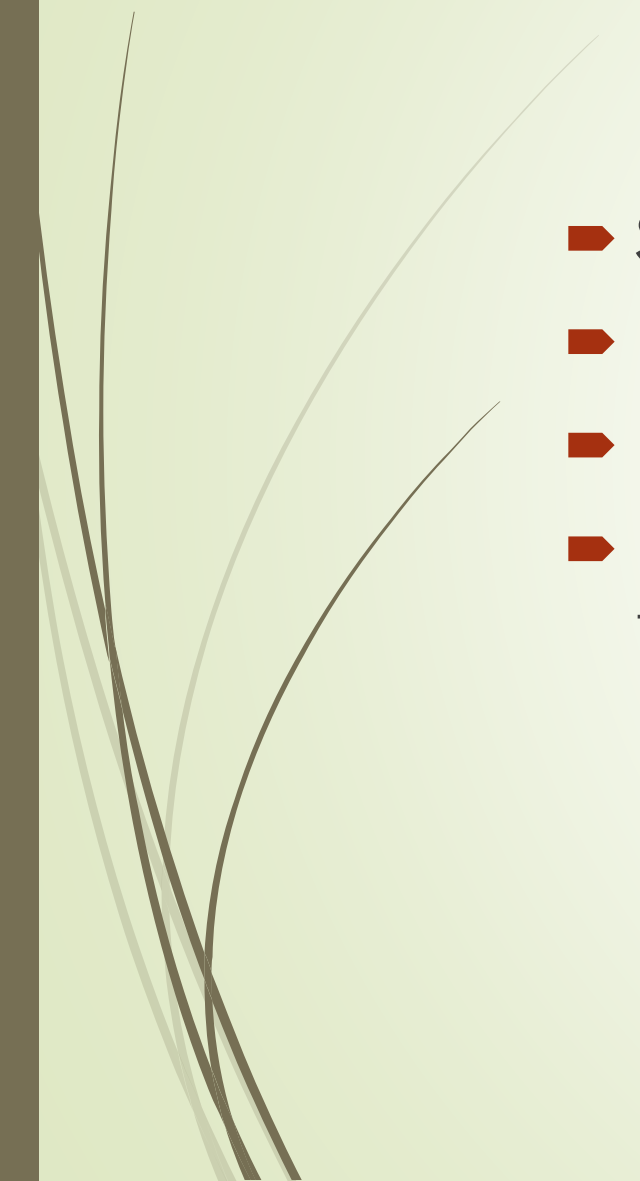


Developing Workflow- Based Help

Cindy Pao



During this session we will

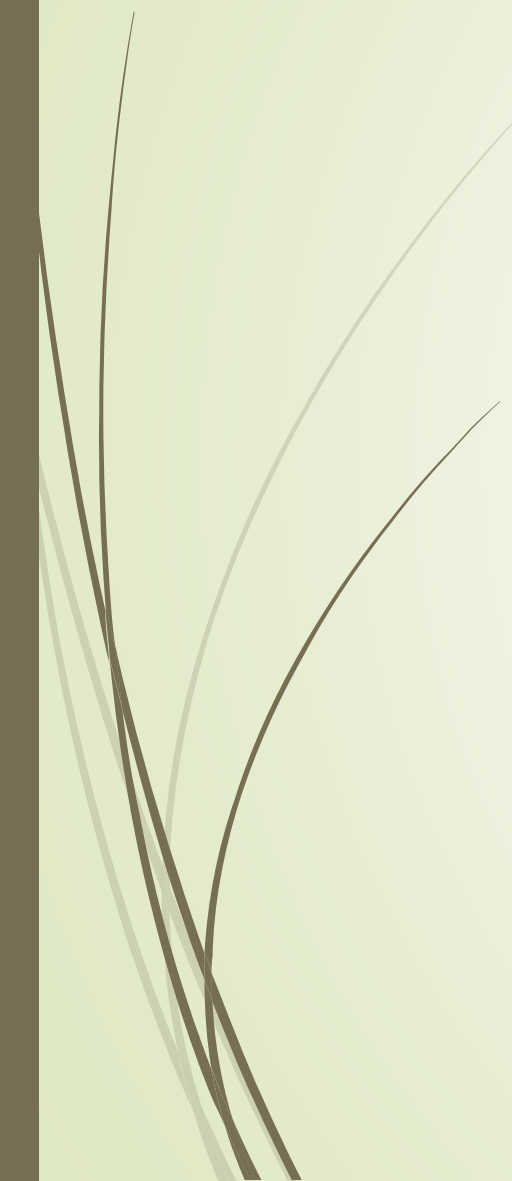
- ▶ See some classic help-project structures
 - ▶ Propose a new organization for help projects
 - ▶ Discuss how to develop workflows for your help project
 - ▶ Incorporate workflows into your help project with a template
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This is Cindy Pao





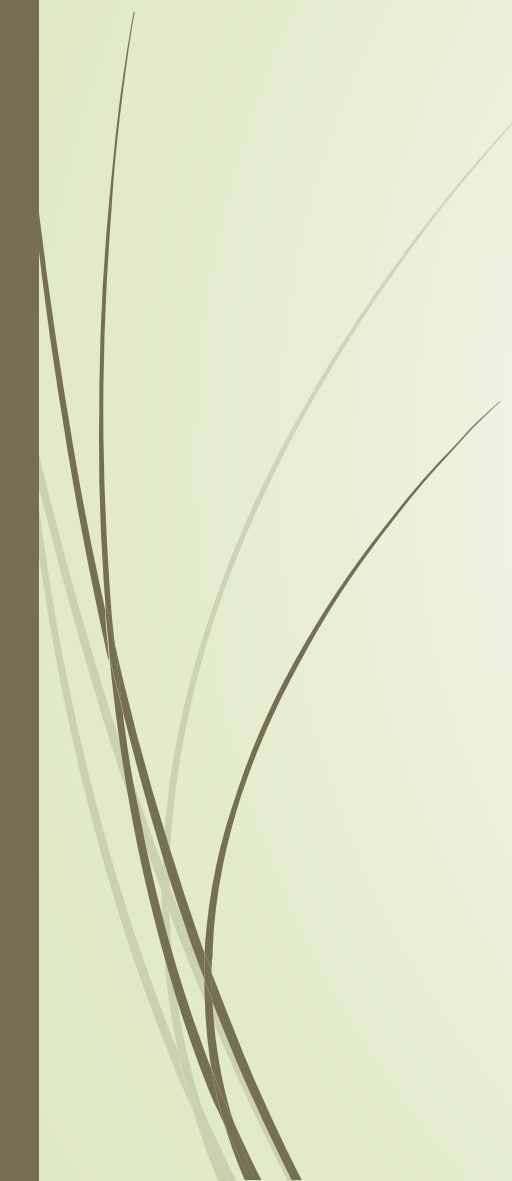
About Cindy Pao

- ▶ Senior technical writer
 - ▶ Currently develop online help and release notes for oilfield software
 - ▶ STC involvement includes, but is not limited to, Director-at-Large on the STC Board; Chair, vice chair, and member of multiple STC committees; President, Co-Manager, and member of several communities
 - ▶ Conference, program meeting, workshop, and webinar presentations include “New Leader Table: The Basics of Running a Community” at the 2017 Leadership Program, “Using a Customer Response System in Writing and Updating User Documentation” at the 2006 STC conference, and “Creating a WinHelp Project” workshop in 2001.
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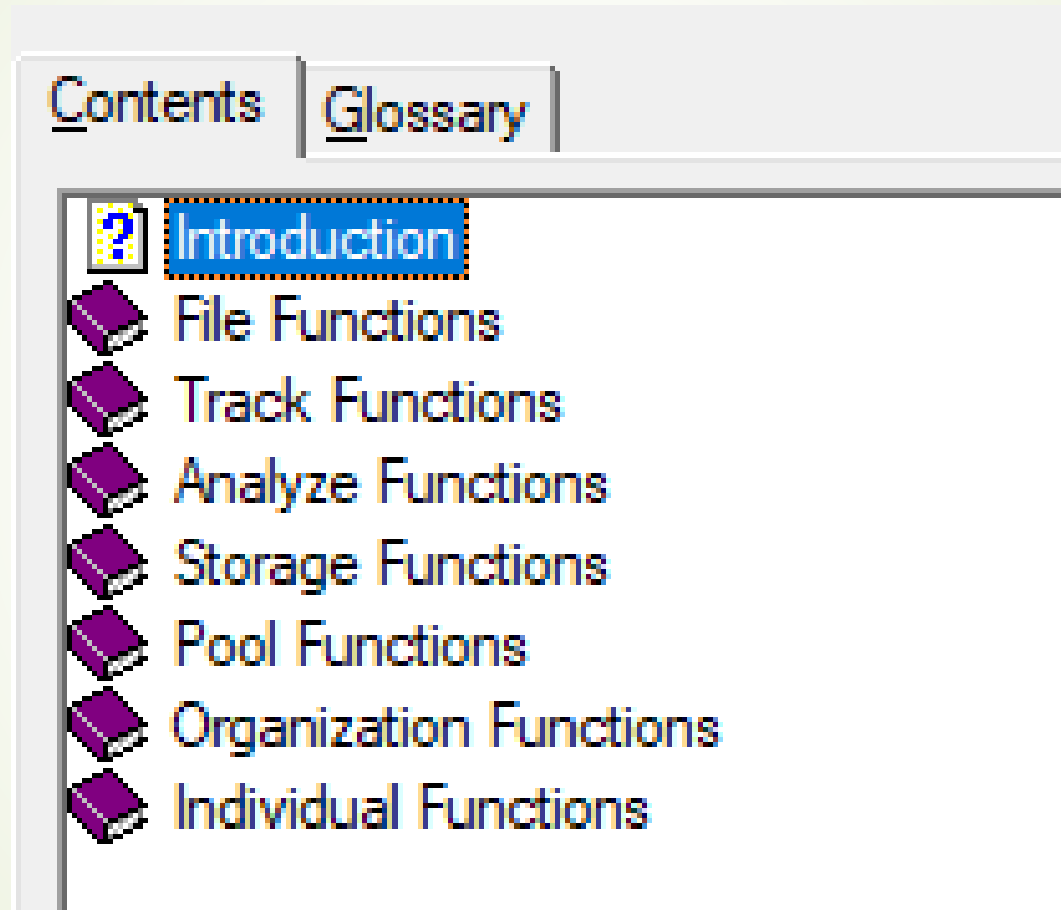


Disclaimer

I cannot share the help system on which I am developing workflow-based help. The workflow-based help systems you will see have been created for this presentation.



Classic Online Help Structures

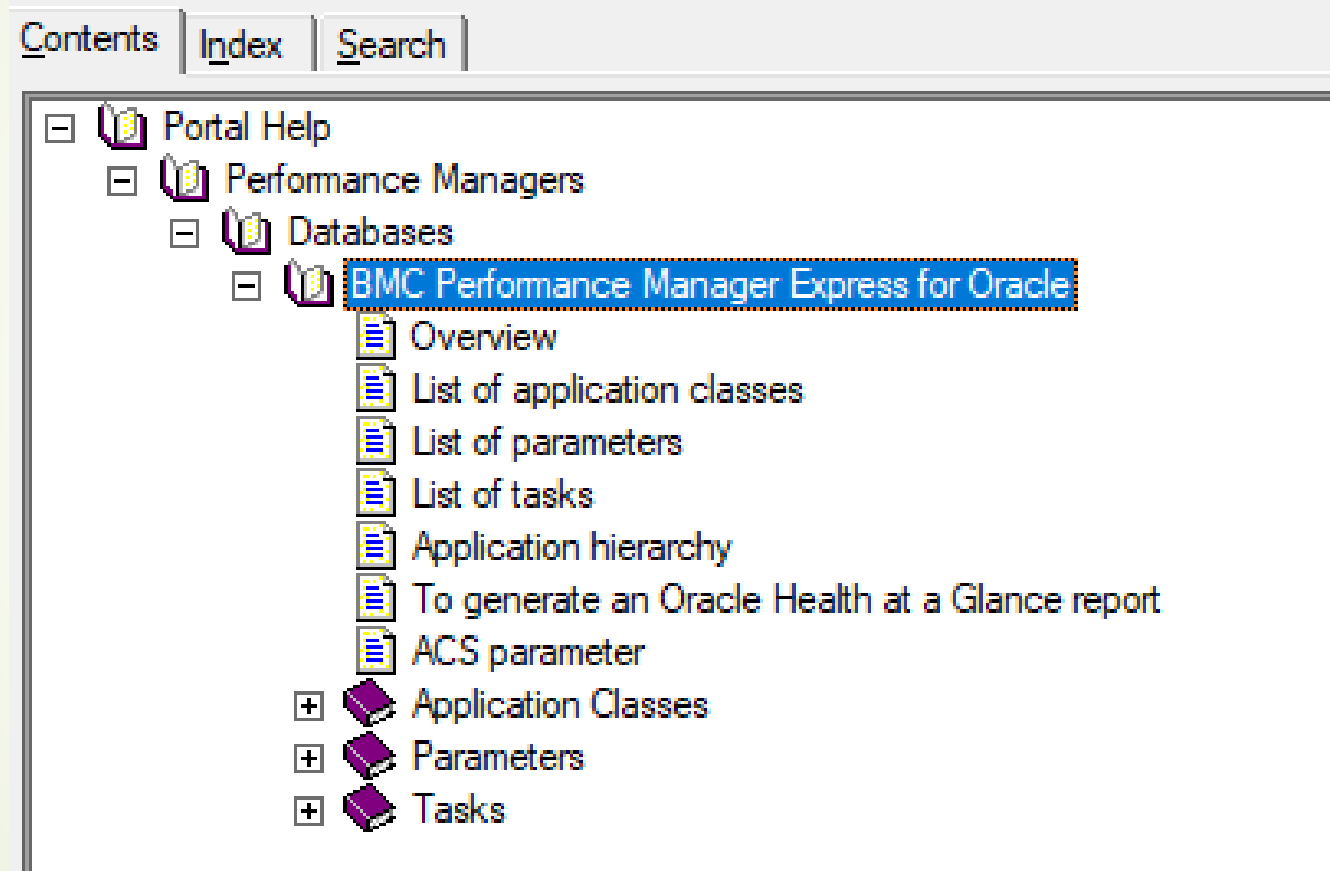




Classic Online Help Structures

- ▼ Introduction
 - ☰ Using RentMe
 - ☰ RentMe Online Help Book Descriptions
- ▼ User Interface
 - ☰ UPDATE F7 RECORDS Screen
 - ☰ UPDATE F7 RECORDS Screen popup
 - ☰ VALID SERIAL NUMBER LIST ADDITIONS Screen
 - ☰ VENDOR List popup
 - ☰ VENDOR MAINTENANCE Screen
 - ☰ VENDOR MAINTENANCE Screen popup
- ▼ Tasks
 - ☰ Adding Detail Lines to a Delivery Ticket from A
 - ☰ Adding F7 Records Procedure
 - ☰ Changing a Material Ticket Procedure
 - ☰ Creating a Repair Ticket Procedure
- ▼ Reference
 - ☰ Customer/Vendor/Store Maintenance
 - ☰ Daily Tubing Status Report
- ▼ Support
 - ☰ New Reports

Classic Online Help Structures





What did we do before?

- ▶ We added as many topics as we could
- ▶ We organized all of these topics into books
- ▶ We put conceptual topics at the beginning of the TOC

With that much information, if your application didn't have context-sensitive help, we probably made it difficult for our users to find information



Let's do something better

- ▶ Work with a user or SME! Find out how they really use your software!
- ▶ Draw some workflow diagrams
- ▶ Create workflow-diagram graphics
- ▶ Incorporate the workflow-diagram graphics into workflow help topics



Do this in your help authoring tool


- ▶ Re-Organize your help project TOC:
 - ▶ Put the workflow help topics at the beginning of the TOC
 - ▶ Put user interface topics at the end of the TOC
 - ▶ Put task topics in the middle of the TOC, and work with your user or SME to group those topics logically into sub-books, if necessary
- ▶ Create workflow help topics
- ▶ Give your workflow help topics the spotlight by including links in the home page for your help

About Flowcharts

Workflow shapes:

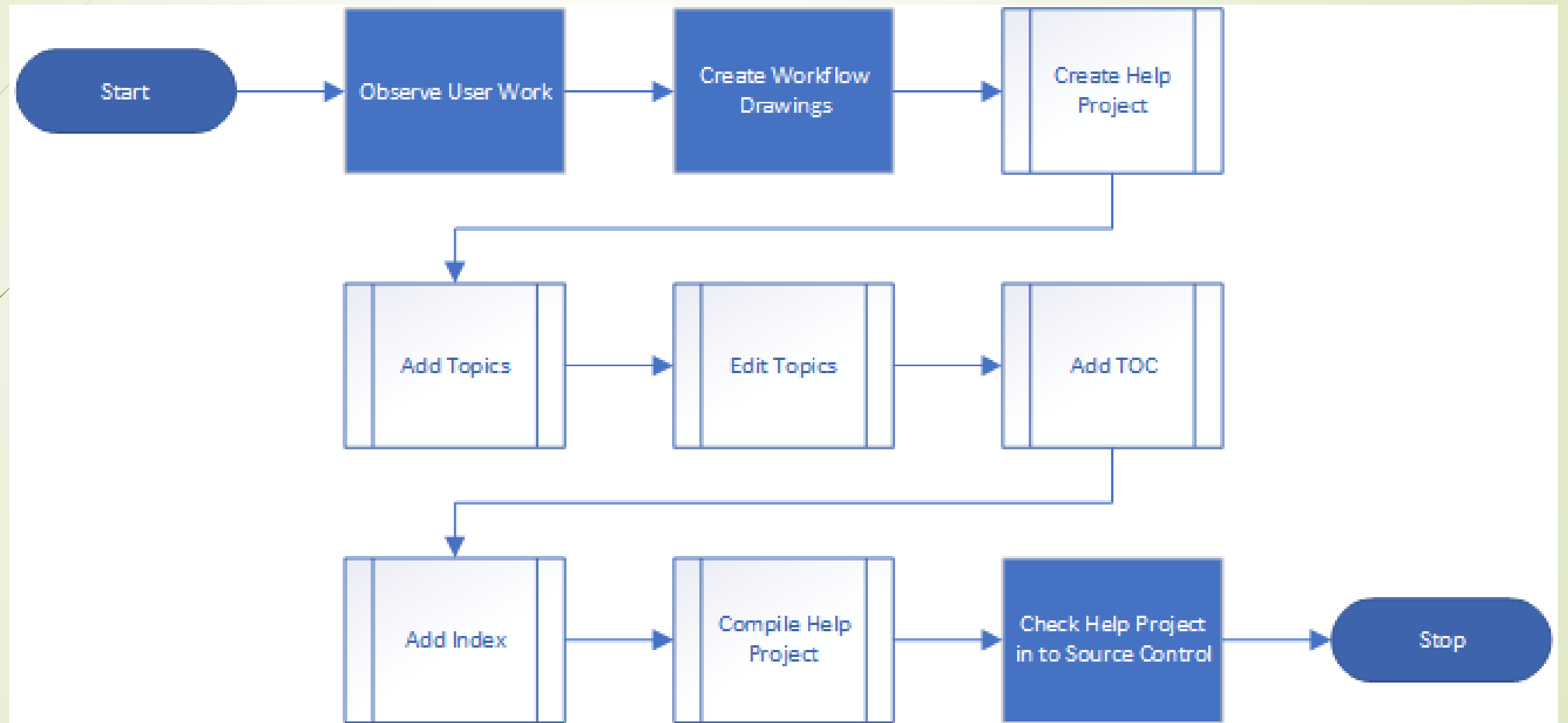
➤ Terminator: 

➤ Process: 

➤ Task: 

➤ Decision diamond: 

Example Flowchart





Start Your Research

- ▶ Work with your user or SME to identify what goal your user needs to accomplish:
 - ▶ I need to create a new help project
 - ▶ I need to configure a development project
 - ▶ I need to receive documents into a file
 - ▶ I need to rent tools to a customer
- ▶ For each of the goals:
 - ▶ Identify each of the activities involved, whether the user is using the software (tasks) or using the brain (process)
 - ▶ Create a flowchart

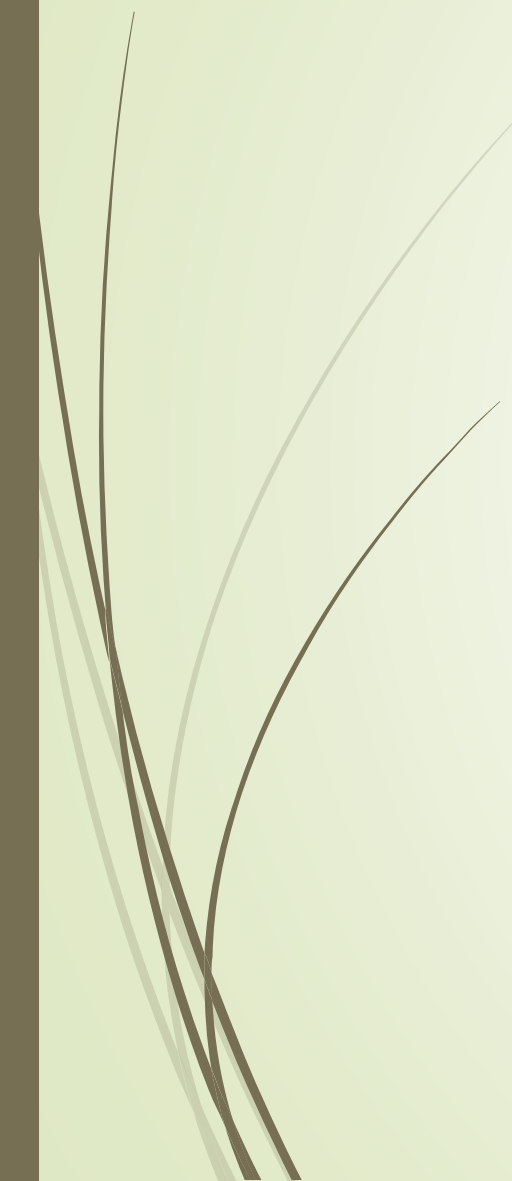


Next . . .

- ▶ Create the flowcharts in flowchart software
 - ▶ Save each flowchart as a graphics file (*.png works fine)
 - ▶ Create workflow help topics
- 

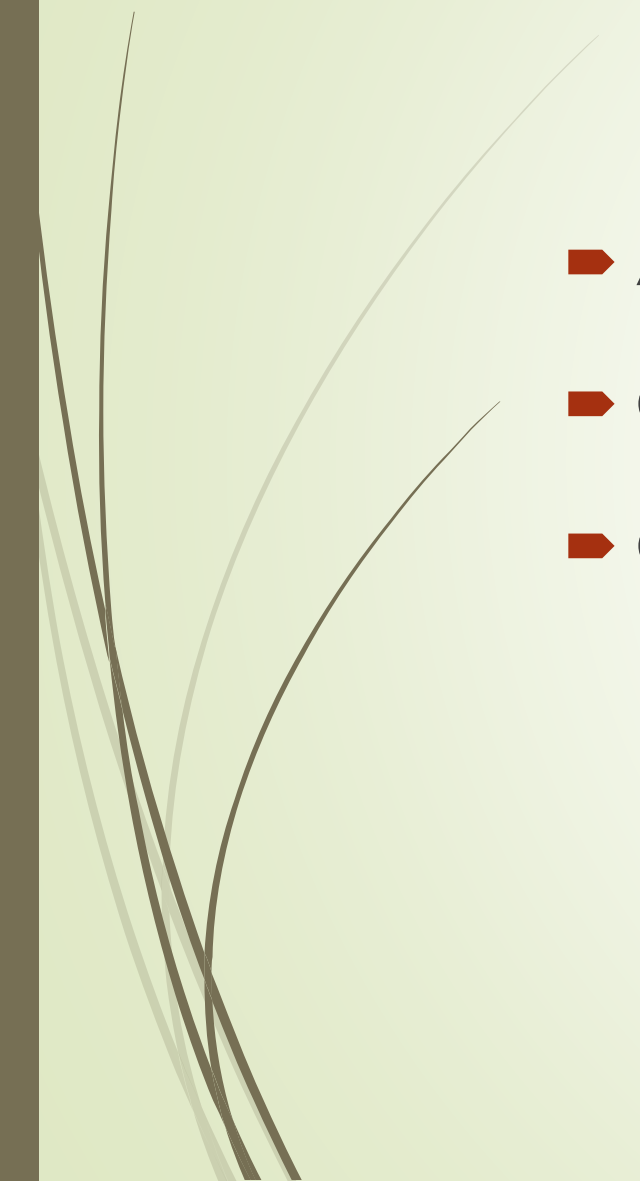


Workflow Topic Template

- Introduction with one of your user's goals
 - Information the user needs before they begin
 - Workflow graphic with hotspots
 - Result of completing the workflow
 - Alternate links to the task topics
 - Links to the previous and next workflow help topics
 - Links to any related topics
- 



Finish the Workflow Topic

- Add the workflow topics to the TOC in their own book
 - Create index entries for your workflow topics
 - Create a browse sequence or add breadcrumbs
- 



Overview Workflow Topics

- When you finish your individual workflow topics, try to create an overview workflow topic
- Ask your user or SME how the individual workflow topics fit together

Instructions to complete the creation workflow:

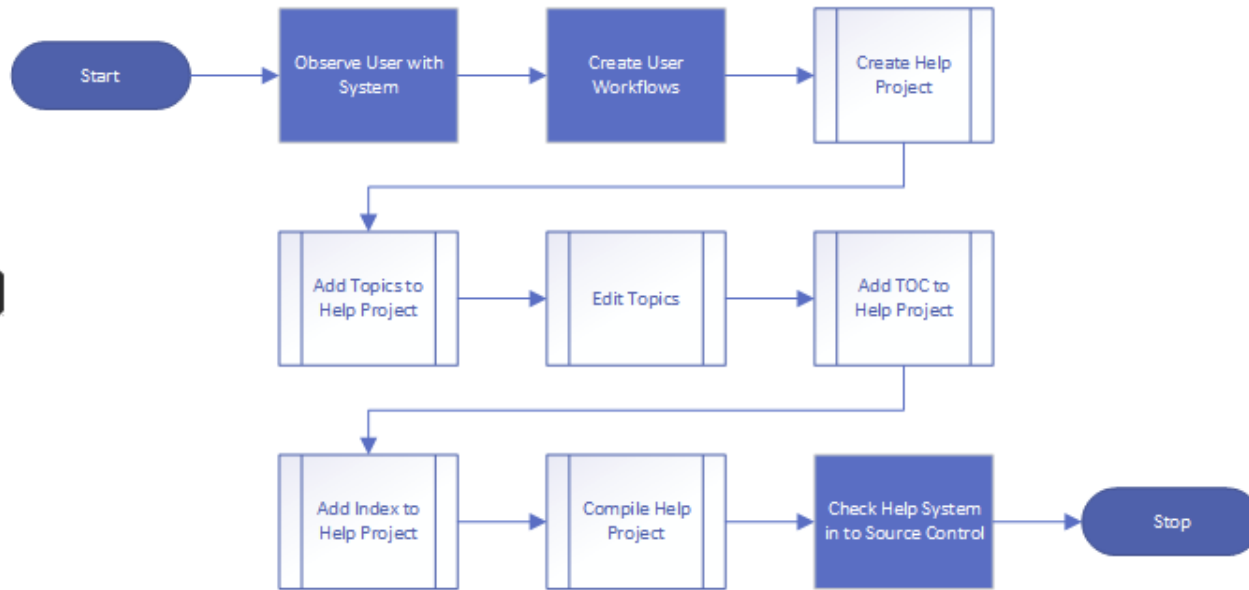
[Creating a Help Project](#) > [Adding Topics to a Help Project](#) > [Editing Topics](#) > [Adding a TOC to a Help Project](#) > [Adding an Index to a Help Project](#) > [Compiling a Help Project](#)

Creating a Help Project

When you begin working in RoboHelp, you must create a help project before you can add tasks and conceptual information.

The flowchart below gives you the basic workflow you can follow to create a project.

- Click a task box (white) to open the help topic with step-by-step instructions.
- Complete the actions in the process boxes (blue) based on your experience and project requirements.



When you begin creating a project, you need the following information:

- product name
- product use workflows

When you finish creating a project, the project is displayed on the RoboHelp window:

The screenshot displays the RoboHelp software interface. The main window shows a document titled "Creating a Help Project" with the following content:

Creating a Help Project

When you begin working in RoboHelp, you must create a help project before you can add tasks and conceptual information.

The flowchart below gives you the basic workflow you can follow to create a project.

- Click a task box (white) to open the help topic with step-by-step instructions.
- Complete the actions in the process boxes (blue) based on your experience and project requirements.

```
graph TD; Start([Start]) --> Choose[Choose User with System]; Choose --> Create[Create User Workflows]; Create --> CreateProj[Create Help Project]; CreateProj --> AddTopics[Add Topics to Help Project]; AddTopics --> Edit[Edit Topics]; Edit --> AddTOC[Add TOC to Help Project]; AddTOC --> AddIndex[Add Index to Help Project]; AddIndex --> Complete[Complete Help Project]; Complete --> Check[Check Help System in its Source Control]; Check --> Done([Done]);
```

When you begin creating a project, you need the following information:

product name
product use workflows

When you finish creting a project, the project is displayed on the RoboHelp window.

The interface also shows a Project Manager on the left with a tree view of project files, and a Styles and Formatting pane on the right with a list of styles including (none), breadcrumbs, Default paragraph font, Description, Expanding text, Glossary text, Heading 1, Heading 2, Heading 3, Heading 4, Heading 5, heading 6, and Normal.



Next Workflow: [Editing a Help Project](#)

Workflow Links

[Creating a Help Project](#)

[Adding Topics to a Help Project](#)

[Editing Topics](#)

[Adding a TOC to a Help Project](#)

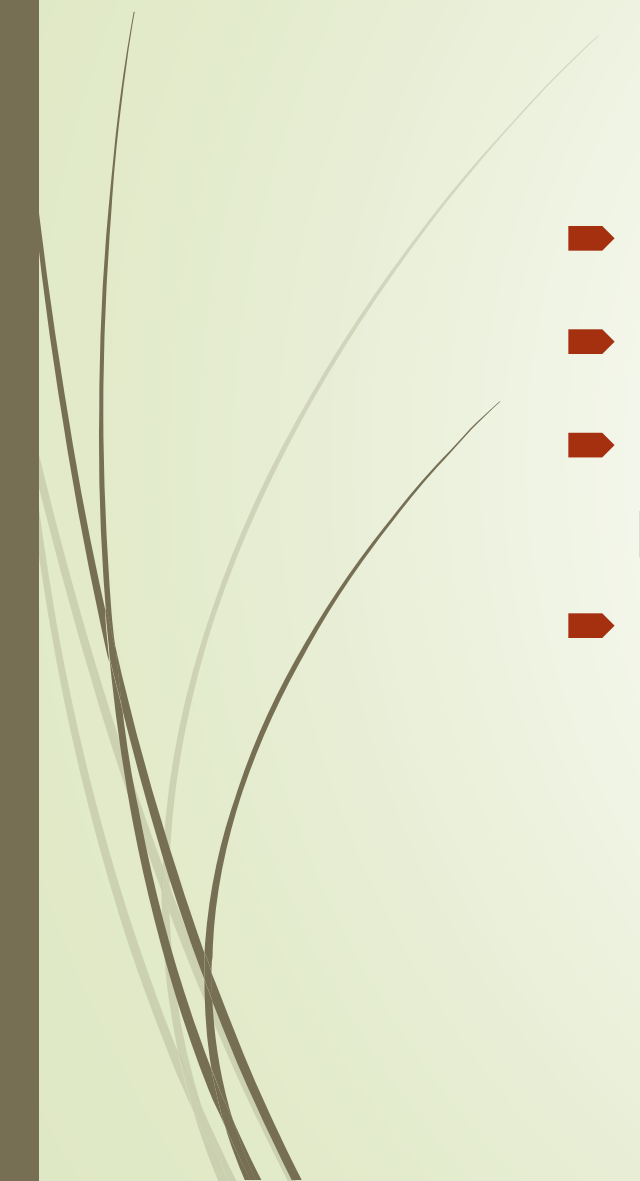
[Adding an Index to a Help Project](#)


[Compiling a Help Project](#)





What we covered today

- ▶ Looked at the organization of old help projects
 - ▶ Proposed a new organization for help projects
 - ▶ Discussed how to develop workflows for your help project
 - ▶ Incorporated workflows into your help project
- 



What questions do you have for
me?

Yes, the slides will be posted



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