MIDDLESEX Community College

Tools and Technologies for Tech Writers 2022

Week 4

Tours and Tutorials

Notices

This document was prepared as a handout for the Middlesex Community College Tools and Technologies for Technical Writers class, Winter semester 2022.

Prepared by Zoë Lawson, course instructor.

Contents

Further reading

A few articles or sites you might want to follow up on.

Gamification and documentation is a thing. It doesn't always work with the style of your company, but it's worth keeping in the back of your mind.https://idratherbewriting.com/2014/02/04/gamification-and-user-engagement-in-e-learning-and-documentation/. Or maybe you can help write the "manual" for a computer game.

Some blog article giving basic tour pointers:

- https://www.wyzowl.com/walkthrough-examples/
- https://www.apty.io/blog/walkthrough-software-why-you-need-it-and-how-interactive-walkthroughs-help-users
- https://www.appcues.com/blog/product-tours-walkthroughs-ultimate-guide

Here are the sites for three overlay tools to review:

- https://www.walkme.com/
- https://whatfix.com/
- https://www.pendo.io/

In-app tours, especially for SaaS/Cloud applications, are becoming more popular. There are many more companies making overlay tools today.

Here are the sites for some frameworks to look at:

- https://github.com/LinkedInAttic/hopscotch
- https://bootstraptour.com/
- https://introjs.com/
- https://isaacplmann.github.io/ngx-tour/

Week 4 Homework

While we don't have access to some new software to play with, we can still mock up a tour.

Mock up a tour

Pick some application of your choice and mock up a short tour.

While this is a short project, and just a mock up, this can be a good thing to add to your resume.

1. Pick an application of your choice.
2. Take a screenshot of the application.

   Tip: Try to keep your tour on one page/screen of the application.
3. Paste this image into Powerpoint.

   For extra credit (i.e. make it easier for you to make the tour mockup), set up a master slide with this image as the background so it's easier to add your tour mockup. In ExampleTour.pptx, I added the image to the "Blank" slide layout.
4. Using the **Shapes** menu from the Insert tab on the PowerPoint Ribbon, add "Tour bubbles" to your screen.

   I recommend you have one tour bubble per slide.
5. If you want, you can try to set up a "self-running presentation" to see what a tour may look like "in action".

   See https://support.office.com/en-us/article/create-a-self-running-presentation-57fc41ae-f36a-4fb5-94a3-52d5bc466037.
6. Upload your "tour" to `Week04-Tours\Homework` in `mcc_tools_tech`.

I made an example tour: `mcc_tools_tech/Week04-Tours/Homework/ExampleTour.pptx`.

Take a screenshot (PC)

If you don't have any additional software that can take screenshots (such as Snagit), there are several tools you can use on a PC.

- Use `PrntScrn`.

  Press `PrntScrn` to capture your entire screen (which can get interesting with multiple monitors).

  Press `ALT + PrntScrn` to capture the active window.

  The image is now "on your clipboard", meaning it's in memory, but not saved anywhere yet.

  Open some image tool (such as Paint), and use `CTRL + V` to paste the image. You can then save the file.
- Use **Snip and Sketch**.
- Use **Snipping Tool** (Older version of Windows only. Soon to be replaced by Snip and Sketch).

See https://www.cnet.com/how-to/8-ways-you-can-take-screenshots-in-windows-10/ for more details about how to use the different snipping tools.

Take a screenshot (Mac)

There are completely different key commands to take screenshots on the Mac.

- Press `SHIFT + COMMAND + 3` to take the entire screen.

  See https://support.apple.com/en-us/HT201361 for the list of additional key commands.

Extra Credit

This work is not required, but does let you experiment with what you might need to do to make a tour work in an actual application.

If you're not using a fancy "overlay" tool like WalkMe or WhatFix, you are probably working with a developer making an internal tour tool. There are many different frameworks that developers start with. Today, most of these are based on JSON. (For more about JSON, see https://www.json.org/json-en.html, https://www.w3schools.com/js/js_json_intro.asp, or https://en.wikipedia.org/wiki/JSON.

One framework is called "Hopscotch", and you can learn about it here: https://engineering.linkedin.com/incubator/creating-product-tours-hopscotch.

And if you follow the link to GitHub, you discover it's no longer maintained. Here's one list of frameworks that were availalble a year ago: https://ourcodeworld.com/articles/read/328/top-10-best-tour-website-guide-javascript-and-jquery-plugins. There are many more out there, based on different libraries that different development teams are using to build their user interfaces. For example, my company is using "Angular" as their code base, so we're using something like https://www.npmjs.com/package/angular-ui-tour.

1. Do the main homework so you have something to base your JSON on.
2. Create a JSON file that defines the tour based on a framework of your choice.

   This is a JSON file for my ExampleTour.pptx based on Hoscotch.

```
var tour = {
  "id": "ExampleTour",
  "steps": [
    {
      "target": "code_tab",
      "placement": "bottom",
      "title": "Code tab",
      "content": "Use the Code tab to browse the files in your
 repository"
    },
    {
      "target": "branch_button",
      "placement": "right",
      "title": "Branch button",
      "content": "Make sure you select the correct Branch
 (Winter2020)"
    },
```

```
    {
      "target": "clone_button",
      "placement": "left",
      "title": "Clone button",
      "content": "Click here to get the URL you need to clone the
 repository locally"
    },
    {
      "target": "branch_tab",
      "placement": "bottom",
      "title": "Branch tab",
      "content": "You can see all the branches in this repository"
    }
  ]
};
```

The target would be some ID in the code of the application. You usually work with the developer to find out what the ID should be. In this sample, make up something that identifies the UI area.

3. Upload to Git.