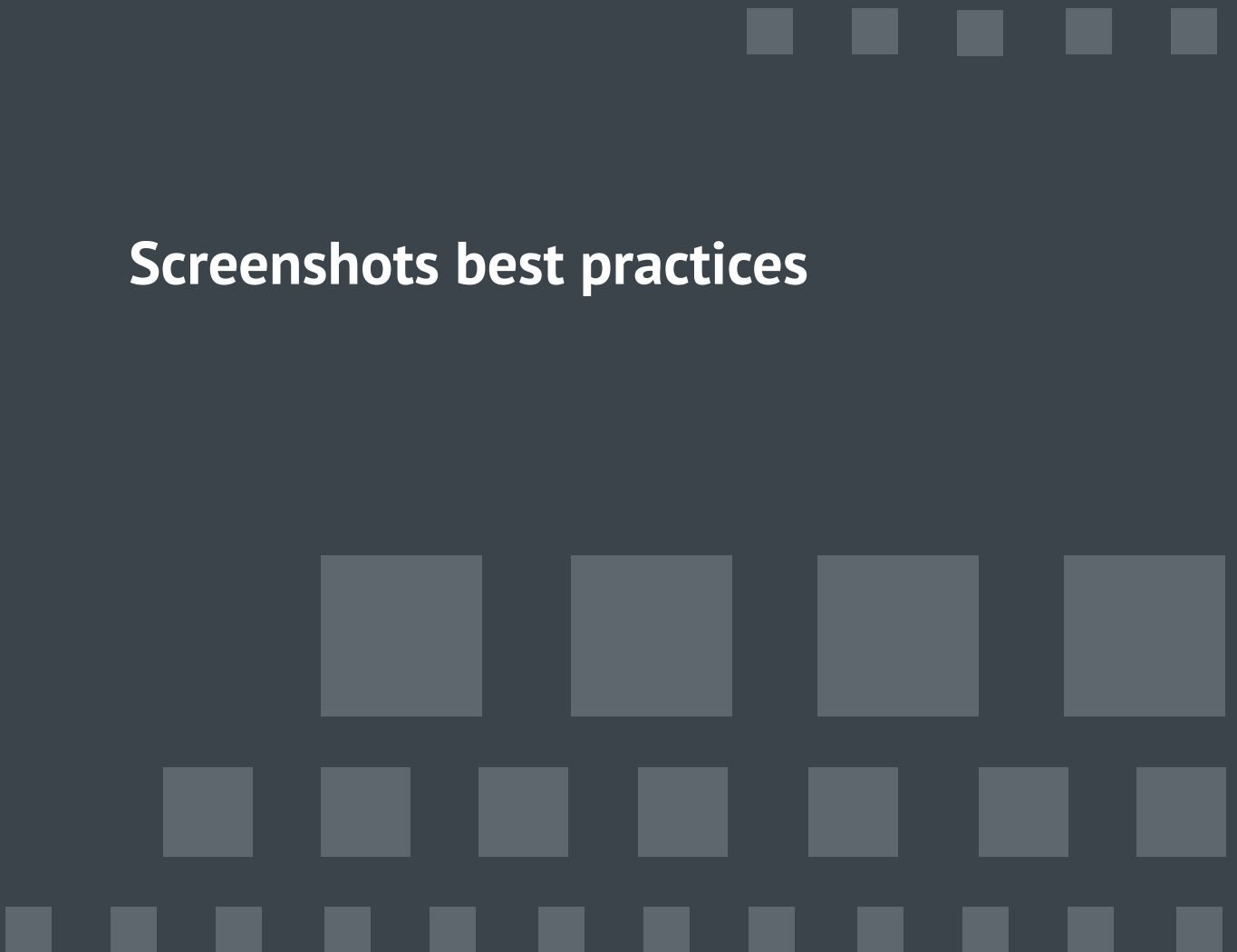


## Screenshots best practices



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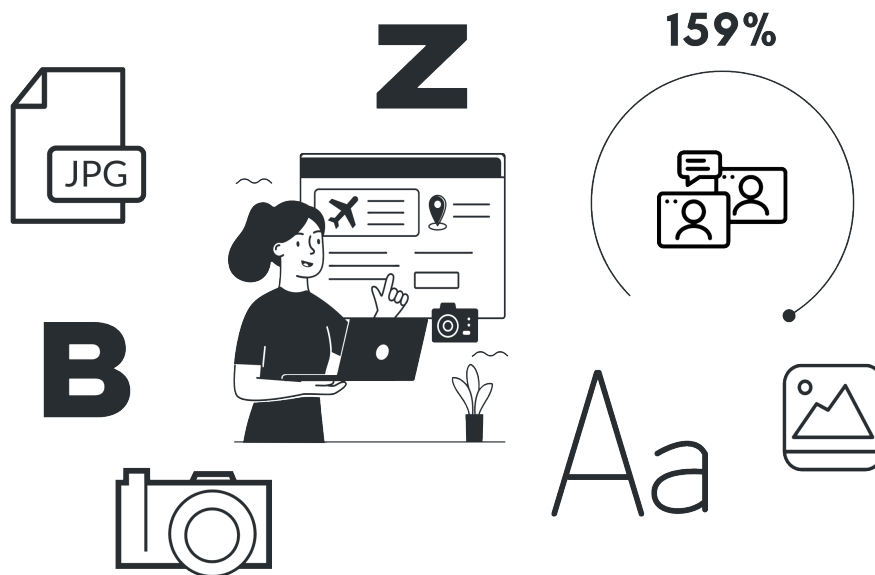
# Chapter 1. Welcome

*The main idea behind this project is to show you how to create great informative screenshots that will save you and your readers a lot of time and learning efforts.*

A picture is worth a thousand words. We all take pictures of our screen from time to time because it is often the fastest way to show and explain something.

But, when making screenshots is part of your working process - this is a totally different thing. Taking good quality pictures for documentation is not always easy. You have to think about many things when making screenshots - image size, image quality, information privacy, text readability...

The main idea behind this project is to show you how to create great informative screenshots that will save you and your readers a lot of time and learning efforts.



## Chapter 2. Terminology

*In documentation, we recognize screenshots which are pictures of a computer screen, or schematic drawings as various diagrams and charts. Learn which names are correct and can be used in your instruction.*

In documentation, we recognize **screenshots** which are pictures of a computer screen, or schematic **drawings** as various diagrams and charts (UML, ERD, flowcharts, ...). Both types have some quality requirements in common.

It is better to say **screenshot** because **printscreen** is the name of a key on the computer keyboard or the full screen view.

Other names for picture are **image** and **figure**. They are usually no difference, and all three can be used interchangeably. However, for example, in reStructuredText, image is a simple picture, while figure has a caption, can be numbered and is generally suitable for more formal books (e.g., “Figure 2.5: Anatomy of the system service”).

## Chapter 3. Do you really need a screenshot?

*One of the common questions when developing documentation is, "How many screenshots should I include?" Decide when to use screenshots in your documentation.*

One of the common questions when developing documentation is, "How many screenshots should I include?" Answers range from "None!" to "All the screens!" A picture may be worth a thousand words, but screenshots are often used as a crutch for poor documentation or poor design. The best answer is to use them when you need them, and don't use them when you don't. So how do you know when you need them?

1. Screenshots are only important to the documentation if they add value to the material. If you have a task that is only about several steps long, and you included a screenshot every step of the way, it overflows the task and makes it look more difficult than it is.
2. Graphics takes time — sometimes it takes even longer to create persuasive visuals as it does to write instructions.
3. For some audiences, screenshots aren't important. For example, you would not tell a developer how to use a mouse; in fact, they may find it insulting that you suggest they use a mouse at all. But if you are writing the content for basic users, they may find screenshots very useful.
4. You must have in mind that every time your document gets modified, screenshots must get updated. And if you used a lot of them, imagine the future task.
5. If you use too many screenshots, users may be overly attracted to the visual and miss important points in the explanatory text.
6. Screenshots will make your documentation bigger, for sure, but if they make the document better, no one will care about bigger.
7. Screenshots may be necessary when you are writing about very complicated configurations or systems.

**With all of the above in mind, when to use and when not to use images?**

✓ Use screenshots for the following purposes:

- to orient users in a complicated or long procedure
- to show complex windows or dialog boxes, such as those that contain multiple subsets of information, with free-form text fields and many options available for selection
- to emphasize a new feature or change in the UI

✗ Do not create or use screenshots of the following items:

- code samples (instead, show code samples in code blocks)
- dialog boxes that are easy to understand, such as drop-down lists and option buttons with few or no free-form text fields
- confirmation boxes
- license agreement boxes
- message text (instead show message text within regular text)
- progress bars
- welcome windows
- wizard pages, especially Welcome pages and other simple pages
- tables created in another authoring tool
- a screen that is volatile and likely to change frequently



**Notice:**

As an alternative to screenshots, use the correct names of the UI labels with which the user must interact and the values that they must choose or enter. Show the names of buttons, options, check boxes, menus, windows, dialog boxes, and so on as they appear on the UI. For example, for straightforward instructions like, “To open a file, select **File > Open**,” a screenshot is not required.

## Chapter 4. How to create a perfect screenshot

*Go through some fundamental steps to make sure your screenshots look the best way possible.*

*Find out what will be the best format, size, layout and how to edit your images.*

Let's go through some fundamental steps to make sure your screenshots look the best way possible.

### Size

- Don't make your image too small. It's fine for an image to take up the full width of a page.
- Screenshots at full resolution often take up too much space on the page, so you may have to resize them.
- In general, don't use an image that's wider than the column it appears in.
- Consider how the image will look when printed out.

### Format

- When saving your screenshots, choose the PNG format over JPEG. The latter is a compressed file format, while PNG allows lossless compression hence more legible text and crisp lines.
- For diagrams (architectural drawings, flow diagrams, and so on, as distinct from screenshots), use SVG files if possible because SVGs stay sharp when you zoom in on the image. If you don't have an SVG file, then save your image as a PNG file unless you have a good reason to use a different format.
- If you are adding some graphic elements to your screenshots, it is a good practice to keep the original pictures to edit them easily.

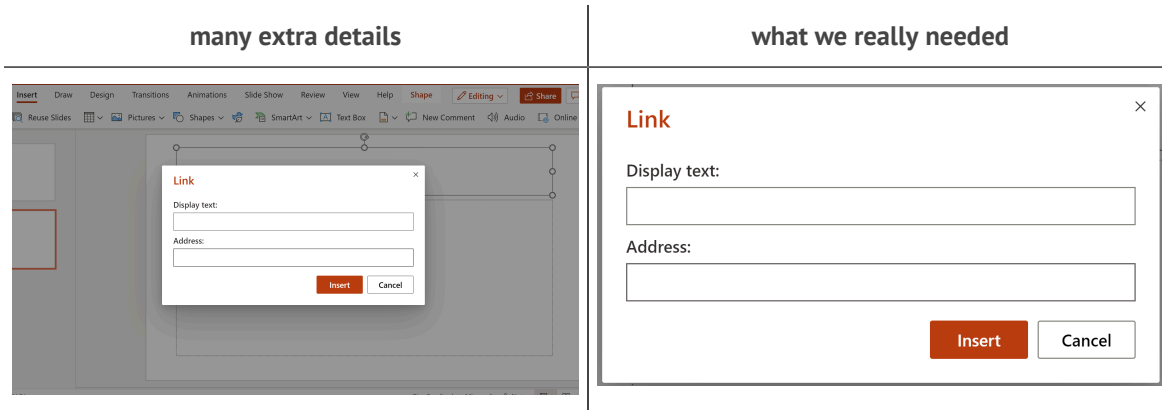
### Cursor

Make sure your mouse cursor is not visible in your screenshots. The best way to hide the cursor is to choose a screenshot app that turns your cursor into a frame-drawing tool. In that case, there will be no visible pointer on the screen. If you use a standard shortcut, the cursor will most likely appear in the shot.



## Editing

✓ Crop screenshots to show the relevant information. Don't include the full window if you just want to show a single button or menu item. Cropping helps the reader focus on the information that you want to convey in the screenshot, and it can help future-proof the screenshot if other parts of the UI change.



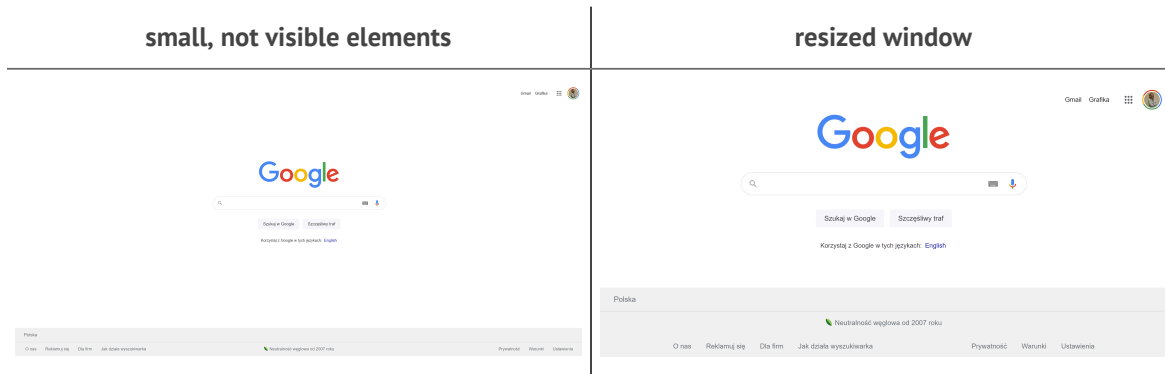
### Tip:

It is always possible to add some graphics to draw attention to the pop-up window, but you need to think, if the other parts of the screenshot are really needed. Remember also that:

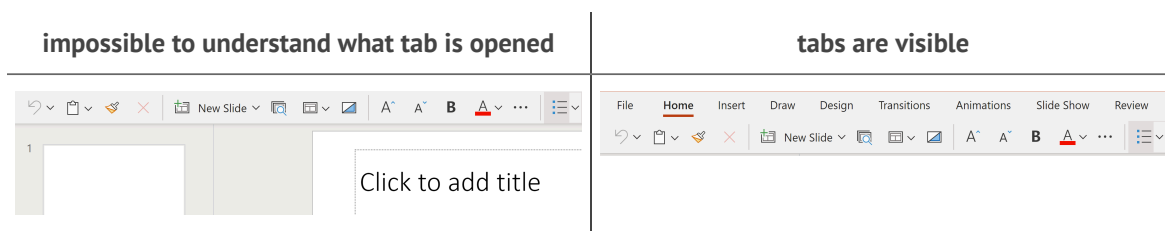
- fullscreen images are usually pretty heavy in terms of the file size, traffic and loading time
- small elements will hardly be visible as such screenshots need to be resized to fit in the text
- fullscreen image content is more difficult to control - there's a higher possibility of accidentally leaving some PII in the picture

✓ Try to do not scale the image too much afterward. But if you must, avoid the dreaded pixelation. Try resizing your picture or screenshot in an image editing program. Keep the same ratio of width to height, and then add it back into your document or presentation.

✓ If you need a big, full-size screenshot, try to resize the window, before you take it. This is especially important for mobile visitors of your documentation. It is recommend to decide upon the max width for all the images.



✓ Figure out precisely what you are doing the screenshots for, and capture just the details you need. Take some time to make sure that no UI element will be left outside the frame if it is of importance. A user should understand where the element in question is located in the UI to be able to find it.

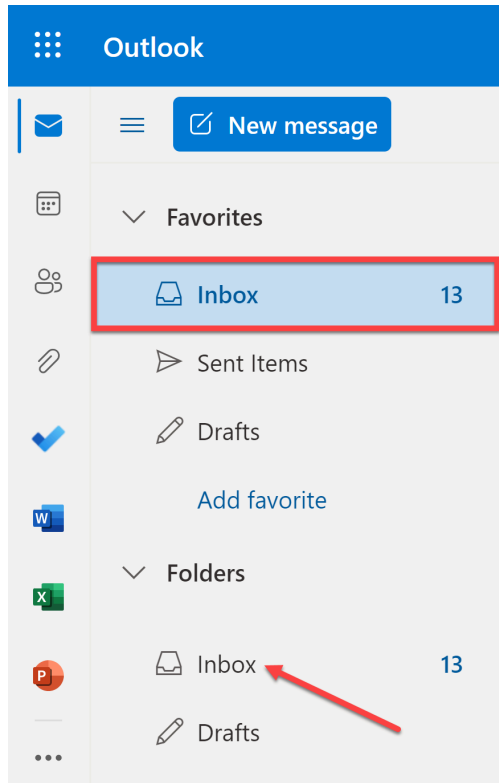


- ✓ Do not use effects like shadow, borders, etc. They usually look ugly, cheap, and generally don't fit well with documentation and books. The trouble with shadow effect is they look good only on a particular background.
- ✓ If possible, use a transparent background, because you don't know which background will have your reader. Docs are outputted to various formats - HTML, PDF, EPUB - with various backgrounds.
- ✓ Use a consistent style of screenshots with enhancements (like callouts, text) and drawings - same font, size, colors, design, etc.
- ✓ Use the same screenshot tool, app version, browser, environment, etc. across your docs and team of tech writers.

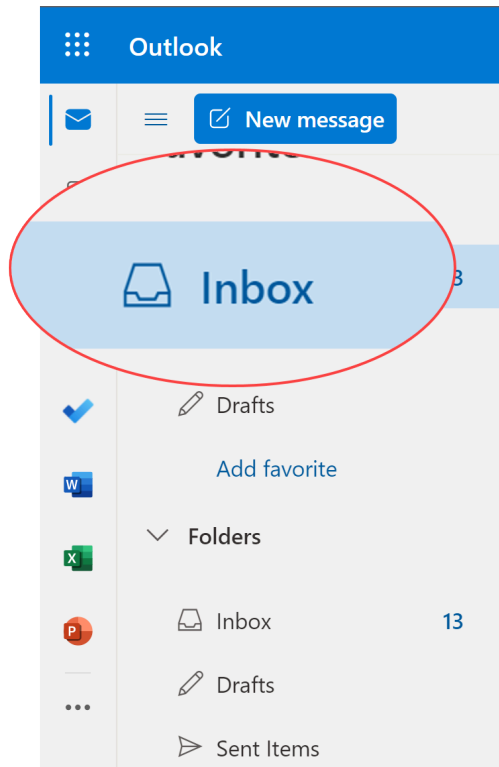
## Graphic elements on screenshots

This may seem like a no-brainer, but adding arrows, numbers or other markings to your screenshots can make them more engaging. Make it obvious which details are important and require the user's attention. Use bright colors to point out important parts so that readers don't have to peer at your screenshot to understand what button they need to click or what link they need to follow.

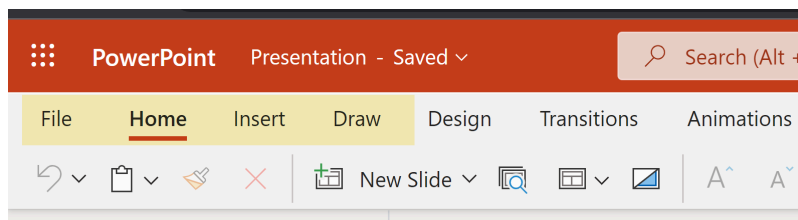
- Pointing arrows at an object or circling it works best. Pick a color that would stand out from the rest of the image. Choosing the color from the user interface palette will make it not visible.



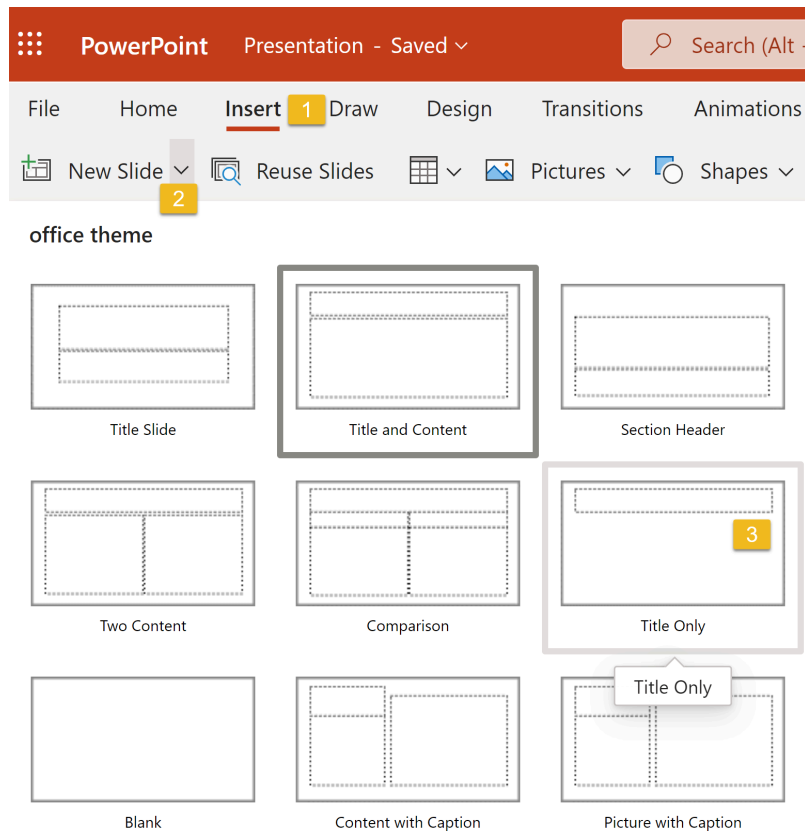
- Stick to the same color and shape of the mark-up tool – this will keep your marks and notes easily recognizable and the overall style consistent.
- Pay attention to proportion and symmetry.
- An alternative way of focusing attention on an element is zooming it in. That works great especially with large screenshots crowded with small details.



- Another useful technique is the highlight, which is supported by some screenshot tools. This is what it may look like:



- You can also add some step numbers on the screenshot:



## Layout of images on a page

- Don't try to place an image manually; for example, don't use a style attribute or other workarounds to control the image's left/right justification or the margins around the image. Instead, for example, use your site's standard CSS image styles.
- Don't make your image too small. It's fine for an image to take up the full width of a page.
- Consider how the image will look when printed out.
- Don't use an image that's wider than the column it appears in.
- Screenshots at full resolution often take up too much space on the page, so you may have to resize them.
- Don't center the image on the page.
- If you are using HTML don't put the `<img>` inside a `<p>`.

## Text in figures

In most cases, avoid embedding explanatory text in screenshot graphics; text that's incorporated into a graphic hurts accessibility and searchability, and increases localization costs if figures are localized. If you must embed text in an image, then be sure to also provide the same information in a form that people with visual disabilities can use, such as a figure description.

When you must include text in figures and images, use the following guidelines:

- Keep text brief, avoid complete sentences and punctuation when possible.
- Don't embed figure descriptions or captions in the figure or image. Instead, put figure descriptions and captions in text following the figure.
- Don't create new abbreviations to condense text.
- Use sentence case.
- Use numbered callouts in figures to help you write a figure description, but don't use callouts for detailed annotations.
- Use full trademarked product names.

## Text associated with images



### Note:

This article will be helpful if you are using HTML or XML.

- ✓ Always introduce an image with a complete introductory sentence. You don't need to introduce screenshots that immediately follow procedural text that describes a UI.
- ✓ Use an alt attribute to provide a text alternative for the image in context. Alt text is used by assistive technologies, such as screen readers, and might appear if the image cannot load. However, if the image is decorative (not informative) or it's provided only as a visual aid for information that is already expressed in text, then provide empty alternative text (alt="") so it will be ignored by assistive technologies. The presence of alt attributes helps support [navigability](#) in screen readers, [markup validation](#), and [search engine optimization](#).
- ✓ Consider the following when writing alt text:
  - Don't include phrases like Image of or Photo of.
  - Include punctuation. When screen readers encounter punctuation, they pause before continuing.
  - Use consistent alt text for repeated instances of an image, such as controls, status indicators, or icons that appear multiple times in your document.

- When possible, avoid using all-caps in alt text. Some screen readers read capital letters as each letter individually.
- Introduce diagrams in the text, not in the alt text.
- Don't use figure captions to replace alt text.
- Write short, descriptive alt text in 155 characters or less. Use full sentences.
- If the image presents more useful information than you can fit in the 155 character limit, include a brief summary of the image in the alt attribute and also include the longdesc attribute to link to a more extensive description of the image. The longdesc attribute value should be a link, not text.
- Alt text should consider the context of the image, not just its content.

✓ Figure captions are concise and comprehensive summaries of a figure or image:

- Use the form "**Figure NUMBER. DESCRIPTION**".
- Use punctuation in figure captions.
- When you refer to a figure, don't use spatial descriptions such as "the image below." Instead, mention it by number. For example: "... as shown in figure 1." Don't capitalize the word **figure** in a reference to a figure, except at the start of a sentence.
- Don't include the figure caption in a sentence referencing the figure.

✓ A figure description is text that provides a more detailed explanation of information represented by a figure. Any new information should be conveyed through text, and not introduced in a figure or image.

✓ The figure description should not be confused with the longdesc attribute, which can be used to provide a more lengthy description of the content and context of an image than can be conveyed in the alt attribute's recommended 155 character limit:

- Create a text that conveys the same information as the figure.
- Use when a figure caption doesn't convey the purpose or complete information of the figure.
- Use punctuation in figure descriptions.

## Picture filenames

The filename is crucial for easy handling, organization, localization to other languages. Good filename describes what is displayed in the picture. There is nothing more annoying than working with images named as `image3712.jpg`. The good filename is, e.g. `web-browser-settings.png`, `disabled-save-button.png` etc.

If you write multilingual documentation, many (if not all) pictures need to be language-specific. Adding language local code to the filename is a good idea. Some system, like Sphinx, have support of multilingual documentation and they recognize locale-specific images with locale code in a filename. You have `save-button.png`, `save-button.he.png` and `save-button.de.png`. If you build docs for Hebrew (he), Sphinx picks up `save-button.he.png`, for German (de) `save-button.de.png`, and `save-button.png` for all other locales.

To prevent problems on case-sensitive platforms, always use lower-case in image filenames. Even some web servers might tell 404 Not Found if you call in URL “img/Save-Button.png” instead of “img/save-button.png”.

## Keep originals

- Some screenshots are published as-is, but often you want to improve their value with callouts, texts, and similar enhancements. Or you draw an illustration for your book.
- To build documentation, you need to export it to a plain image format like PNG or SVG. However, you should keep the original artwork source format for future editing and localization. For example, keep `.pptx` of flowchart crafted in PowerPoint, `.ai` source file of Adobe Illustrator diagram, `.snag` for Snagit screenshots, etc.
- Store (and version) these picture source files alongside with the docs. A good name for such a folder is **artwork** or **originals**.



# Chapter 5. Simplified User Interface

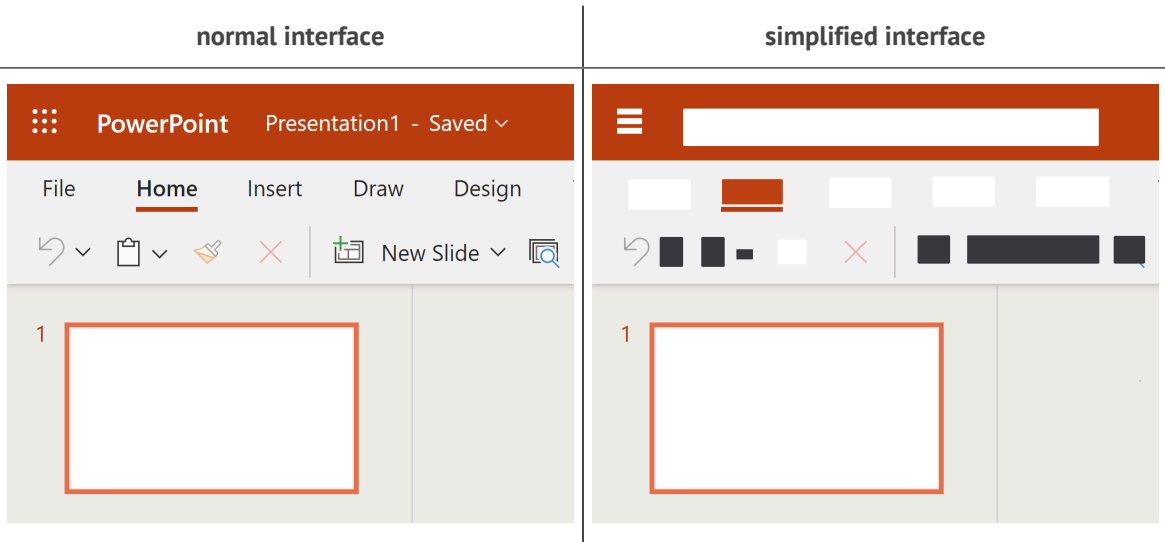
*A simplified user interface (SUI) is a visual representation of a software interface that removes unimportant elements and reduces them to simpler shapes. Check how to create SUI and where to use it.*

It is hard to imagine any complicated system documentation without screenshots of user interface. However, software updates are very frequent. These regular updates, coupled with localization processes, can make documentation work really challenging and time consuming.

How can we face these challenges without having to constantly update supporting content?

## What is SUI?

A simplified user interface (SUI) is a visual representation of a software interface that removes unimportant elements and reduces them to simpler shapes.



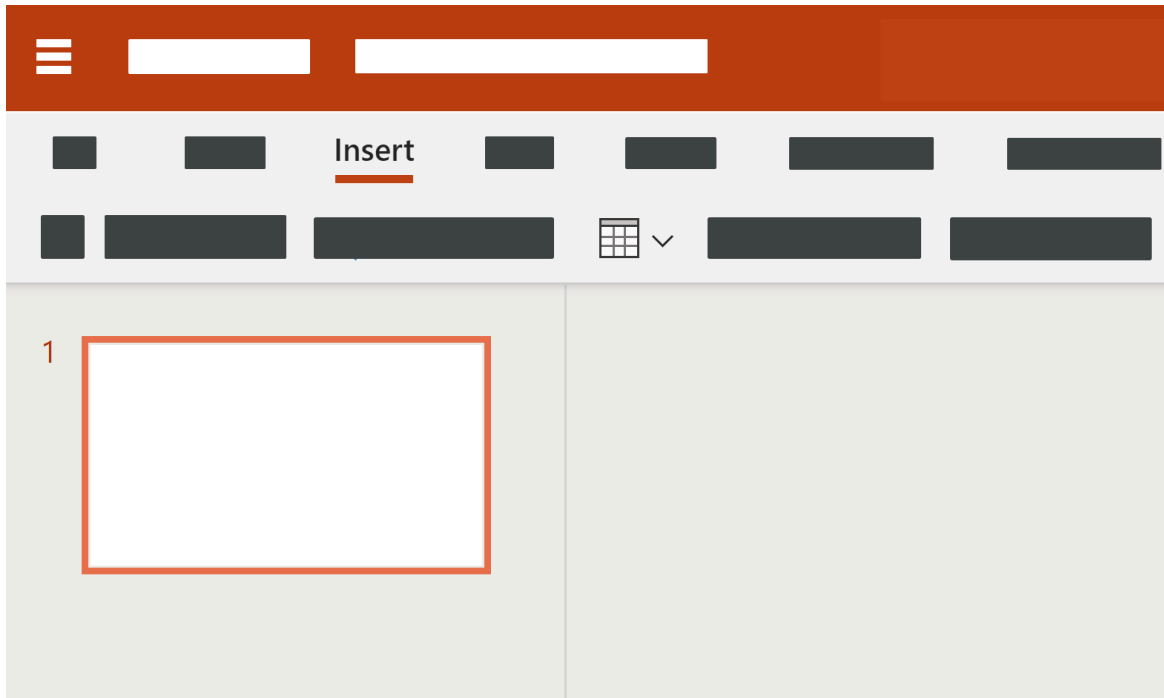
The elements that are fundamental to the instructions or for the user to understand are purposefully kept visible and the SUI graphics serve as a visual aid to support the instructional content given, via the sub- or figure text.

SUI graphics allow for easy-to-follow instructions which enable the reader to get to the point quickly and to avoid distractions.

## Why to use it?

### Better user experience

When you reduce the amount of distractions for your audience, they are better able to focus their attention on what is important. In the below example, only a single menu item is shown so as to direct the user's attention to something specific.



Using a simplified user interface in help documentation can aid in user success by giving them **only** the information they must have in order to be successful, increasing their success and satisfaction with a product.

### Keeping content up to date

Keeping content up to date is one of the biggest challenges faced by technical communicators today. If we look to software as an example, new features and functionalities are being added frequently. And with each feature addition to the user interface, the instructions are at risk of becoming quickly out of date.

Simplified user interface graphics can play a strategic role in keeping the documentation updated. The removal of a button or addition of a feature will easily confuse the user if this change is not reflected in a screenshot. However, a simplified user interface graphic can often sustain multiple software

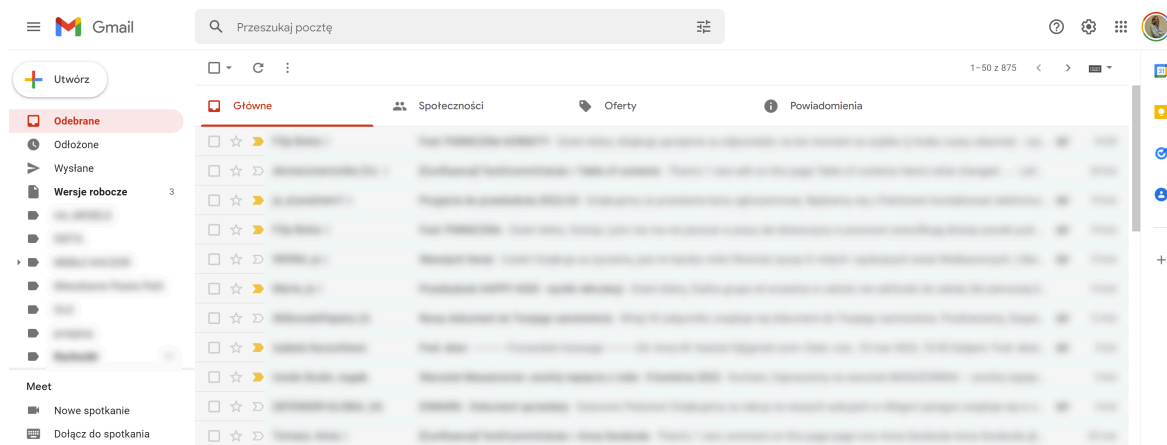
versions and updates before needing further updates. The simplified design is more forgiving to minor interface changes and additions as it is already an abstract representation of the interface.

### Faster content localization

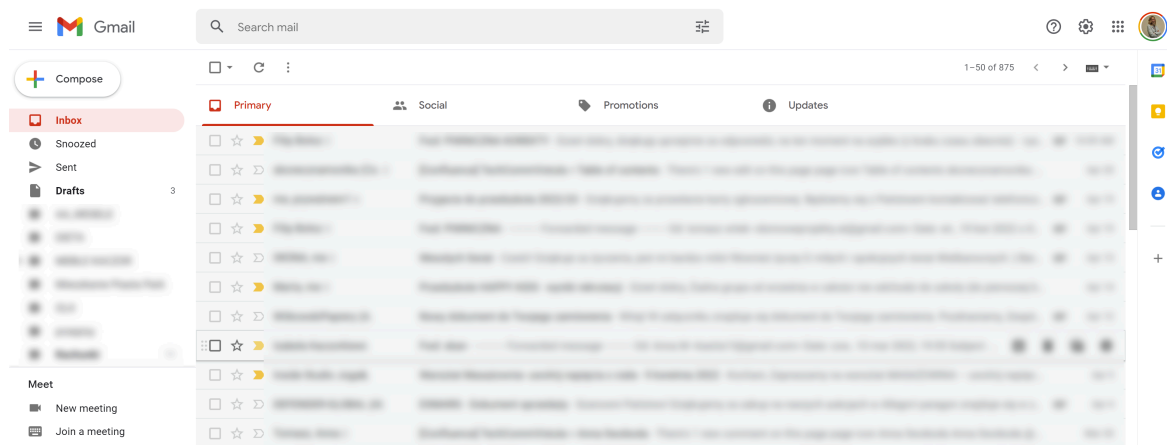
During the localization process, it can be time-consuming and expensive to create screenshots and graphics for each locale. Yet, the localization of onboarding materials and other graphics can be trivial for any organization that wants to be successful internationally.

Most technical writers know the effort it takes to create and manage unique screenshots for each language. In order to simplify this task, you can design the content to use SUI images instead of language-specific screenshots. The same graphic can often be repurposed across multiple languages with little to no adjustment. Additional information or instructions can be conveyed through the sub- or figure text.

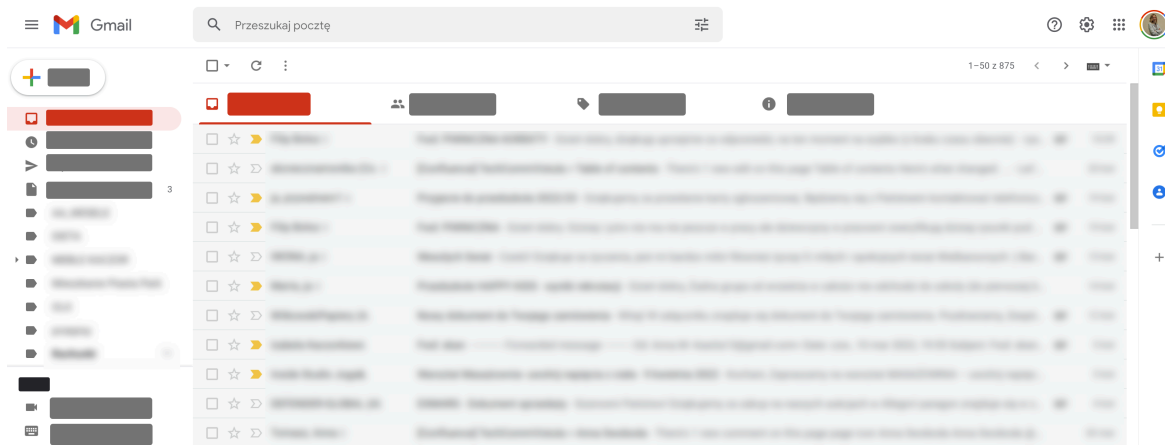
### polish version



### english version



## SUI version



## How to create SUI?

Creating a simplified user interface (SUI) graphic is easier than you think. The best way is to begin with a screenshot and then transform it. To do this, you need screen capture and image editing software. I use Snagit in my daily work, as it has both of these functions. Additionally, it also has Auto Simplify feature that recognizes shapes and text and then automatically covers them with the themed elements.

1. Capture a screenshot of the user interface you want to turn into a SUI graphic and open it in the chosen editor.
2. Crop the screenshot to the dimensions of your desired output.
3. Cover up and remove visual noise like unrelated text, menus, buttons, or tool tips to reduce the complexity of the image and focus attention on the important parts.



### Tip:

Use the color palette which works with your interface.

4. Save your file as a .png to be used in your documentation.



**Tip:**

It is also recommended to save your final image as a project file type. It allows you to reopen the project to edit and adjust the image later on. This makes updating your image easy so you won't need to recreate your SUI graphic every time.

## Chapter 6. Think about privacy

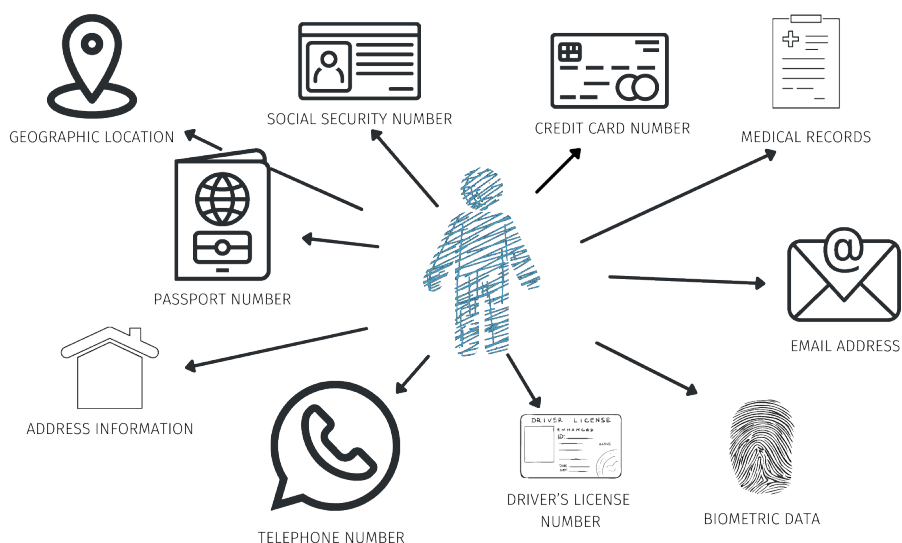
*You often need to take a screenshot of a page that contains confidential information such as account identifications, income data or personal info. Make sure to mask, modify, or remove any personal identifiers, passwords, logins, or other information that could compromise security.*

Even when we take a screenshot to send it to a friend, we have to be aware of what we are doing to avoid awkward situations like showing people too many opened browser tabs, or how your music player is stuck on the new One Direction album. See, even then we have privacy concerns. The situation gets more serious when taking screenshots is part of your job, and revealing some sensitive information could harm the business or its reputation.

You often need to take a screenshot of a page that contains confidential information such as account identifications, income data or personal info. Make sure to mask, modify, or remove any personal identifiers, passwords, logins, or other information that could compromise security.

Basically, all information considered PII or SPII should be hidden. If a source screenshot includes PII/SPII, hide it with a solid-color overlay with 100% opacity. Don't rely on blurs, mosaic effects, or similar image-processing effects to obscure PII. They may look better on your screenshot; however such effects can be reversed to reveal the original information.

If you're exporting an image to a format that can include information on separate layers (for example, PDF or TIFF), flatten the image on export.



## What is PII?

Personally Identifiable Information (PII) is any representation of information that permits the identity of an individual to whom the information applies to be reasonably inferred by either direct or indirect means.

**The following basic guidelines apply to classifying data as PII:**

- An individual's name, legal customer name, email address, mailing address, or telephone number, either alone or in combination
- Any information that is combined with PII or can be linked to PII with a reasonable level of confidence based on information available
- If there is any doubt about whether the information is PII, you should treat the data as PII until the data is re-classified by your company
- IP addresses, unique cookie or device ID and unique account identifiers, and any information your company classifies as personal identifiable data

## What is SPII?

It is Sensitive Personally Identifiable Information (SPII): A subset of PII that is subject to heightened legal requirements or presents a significant risk or harm to an individual if it is compromised or misused.

Sometimes even anonymizing SPII may not eliminate this risk of harm.

**The following basic guidelines apply to classifying data as SPII:**

- Account Credentials: non-public information used to log in, authenticate, or authorize activity as a particular individual
- Cardholder Data (CHD)
- Healthcare Information
- Bank account number
- Credit card number (the first six (6) digits of the card number, if stored or processed in isolation, are not considered SPII)
- Passwords, passphrases, and PINs
- Cryptographic keys or authentication code

- Data that would permit account access or recovery (e.g., user-selected secret questions and answers, account creation date)
- Biometrics or DNA data
- Session cookies (when used for authentication)
- Government Identification Numbers, such as SSN
- Financial account data, such as account numbers
- Sensitive Background Information, such as ethnicity, political affiliation, sexual orientation, or religious affiliation, etc.



## Chapter 7. Useful tools

*With good screenshot software, it is easy to take screenshot and has built-in editor for basic operations like cropping, drawing arrows, adding shapes and texts etc. Find a proper screenshot tool for yourself.*

Good screenshot software is an essential tech writer's tool. With good screenshot software, it is easy to take screenshot and has built-in editor for basic operations like cropping, drawing arrows, adding shapes and texts etc.

There are several screen capture tools that are available in the market, which in turn will help you to take a screenshot of the entire desktop or screen. These tools may vary in features such as screenshot size, quality, supported operating system, file format types, etc. You can choose from [free \(on page 27\)](#) or [paid \(on page 25\)](#) tools

### Paid tools

#### Snagit

**Snagit** is a product of TechSmith Software Company. A user can add comments on the captured screenshot using arrows, shapes, etc. It has built-in advanced image edition options and screen recording facility.

##### **Key Features:**

- It has a preview window which shows the zoomed image of the area on which the cursor is hovering,
- Images are editable in terms of size, special effects, etc.
- A quick toolbar speeds-up the screen capture process.
- Snagit supports Windows and Mac Operating Systems.
- Snagit is available in various languages like English, Japanese, Korean and German.
- It is also used to record a video of the screen and easily share it across the web or email.
- It takes a full-page, scrolling screenshot and captures vertical & horizontal scrolls.

#### Screenpresso

Screenpresso is a screen capture tool which is helpful for training document, evidence etc. It is a standard and simple screen capture tool. It captures the image in various modes such as full screen, user-defined area, scrolling window capture, etc.

Screenpresso allows the user to save captured images in various formats and also save all recent capture history.

**Key Features:**

- Screenpresso is available in the free version as well as a premium version at a cost of €89 per user.
- Screenpresso is a light-weight screen capture tool with a built-in image editor.
- It highlights and edits the captured images with arrows, colorful bubbles, text boxes, ellipses etc.
- It maintains the history of all captured images.
- Captured images can be converted into PDF, Microsoft Word or HTML document using a document generator.
- It also imports media files from other devices like iPhones etc.
- Automatically publishes the images and videos to 13 online services.
- Screenpresso is available in 19 languages.
- It supports all 64-bit Windows versions such as Windows 7, Windows 8 and Windows 10.

## FastStone Capture

[FastStone Capture](#) is a screen capture tool, which easily captures the entire screen in various forms such as rectangular, fixed region defined by the user, etc. The captured images can be sent to printer, clipboard, and email. The captured images can be uploaded to social media sites or any other website.

**Key Features:**

- For lifetime licenses, the cost is only \$19.95.
- It is a quick, lightweight, powerful and extremely responsive tool.
- FastStone Capture allows for Resizing, cropping, sharpening and watermarking the captured images.
- It captures multiple windows, multi-level menus, etc.
- It saves captured snapshots in BMP, GIF, JPEG, PNG, TIFF and PDF formats.
- It can be run from removable drive such as iPod, USB Flash drive, etc.
- It has a built-in screen recorder which saves video files in .WMV format.
- It has built-in color picker for color sampling.

- Screen capture tool can be instantly activated using global hotkeys.
- FastStone Capture allows the user to join or combine images to convert into a single image file.

## Free tools

### Snipping Tool

Snipping tool is a program which is part of Windows Vista and above versions. Snipping Tool allows you to take a screenshot of your screen. It can be delayed for a few seconds while capturing the screen in case of hover. It allows the user to capture the whole screen or user-specified area in a rectangular form.

Snipping tool allows the user to add notes to the screenshot.

#### Key Features:

- Snipping Tool is a default tool on Windows PC.
- It is a free and easy to use tool which comes with the Windows Operating System.
- A user can edit these snapshots using a colored pen, highlighter, etc.
- Snipping Tool allows a user to write on the screen capture, save it and share further.
- Captured images can be stored in PNG, GIF, and JPEG format.
- After capturing the screen, it automatically gets copied and it can be further pastes as required.
- It has 4 types of modes to capture the screen – Free-form Snip, Rectangular Snip, Window Snip, and Full-screen Snip.

### Jing

[Jing](#) is a screen capture tool provided by a software company named TechSmith. The captured images are directly shared on screencast.com and they provide the URL to copy/paste the images as per the user's choice. It also allows the user to capture video of your screen.

Due to the ease of use and free software, it is a favorite tool in the market.

#### Key Features:

- Jing is a free software to install on your PC.
- It is available for Windows and Mac Operating Systems.

- Jing allows a user to share screen capture images very quickly.
- It is easy to use and has a user-friendly user interface.
- It allows uploading images and URL to the social media sites like YouTube, Flickr etc.
- Jing Pro software removes the brand name from the images and provides additional features.

## Skitch

Skitch is a screen capture tool developed by EverNote for Mac and Windows. It is a quick image capture and annotation tool. This freehand tool helps to mark areas while Pixelate tool blurs any user-specified area such as special number, cost, license number, etc.

### **Key Features:**

- Skitch is a free tool available for both Mac and Windows.
- Using Skitch tool a user can highlight any particular section or area and can also add comments on the captured image.
- Its simple to use with a user-friendly interface.
- It is also available on mobile platforms such as Android and iOS.
- A user can also use Skitch for annotating photograph directly from the camera using arrows, colored pen highlighters, etc.
- The captured image can be directly uploaded or attached to an email message.
- All editing options are available under one menu which helps to find the tool easily.