



MIDDLESEX Community College

Tools and Technologies for Tech Writers 2024

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 2024.

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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://bootstrap-tour.com/>
- <https://introjs.com/>
- <https://isaacplmann.github.io/ngx-tour/>

Food for Thought

While I haven't written a lot of tours, they are a lot harder than you think.

"If you want me to give you a two-hour presentation, I am ready today. If you want only a five-minute speech, it will take me two weeks to prepare." — Mark Twain, writer.

And many more similar quotes from <https://intenseminimalism.com/2010/if-i-had-more-time-i-would-have-written-a-shorter-letter/>.

- Writing short text is *hard*.
- You need the bare minimum to get started. Don't go into detail.
- Don't tackle too much. No, less than that. Really, don't do that much. 3-5 clicks tops.

Remember how you feel clicking through a tour that never ends.

- This is a tour, not a wizard.

If you realize you need to switch screens, open up dialog boxes or panels, or manipulate the application to go elsewhere, you need a wizard, not a tour.

For example, we can't write a tour on how to do a pull request from GitHub Desktop because you need to do it in a browser. You can't even do a tour on how to do a pull request from GitHub.com because you have to change pages/screens.

For a first tour, you probably want to pick a "welcome to this UI" style instead of a "how to".

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 screen capture of the application.

Tip: Try to keep your tour on one page/screen of the application.

You can absolutely take a screen capture of an app on your phone or tablet.

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 Screen Capture (PC)

If you don't have any additional software that can take screen captures (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 Screen Capture (Mac)

There are completely different key commands to take screen captures 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 available a few years 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, at a previous employer, we were using "Angular" as their code base, so we're using something like <https://www.npmjs.com/package/angular-ui-tour>.

1. Open your javascript file in a text editor.

In the `Week04-Tours\Homework` folder, there's a `YourInitials_readtour.js` file.

2. Update the JSON in the file to revise the tour.

This tour is based on <https://introjs.com/>. See their documentation for real details. I've implemented something very rudimentary.

- Do not touch any of the following lines:

```
1    function startTour() {
2        introJs().setOptions({
3            steps: [{
4                ...
19            }]
20        }).start();
21    }
```

- The initial step has only the title and intro. That starts the tour with a welcome window that's not associated with any UI piece.

- Here's my understanding of the options:

title	Short text that is the title of the tour bubble. This is optional.
intro	The text of the tour bubble. Avoid special characters, including apostrophes.
element	You can select any HTML element by the <code>@class</code> or <code>@id</code> attribute. Use <code>document.querySelector('.className')</code> or <code>document.querySelector('#idName')</code> . If you look at <code>login.html</code> , most elements have a unique <code>@class</code> or <code>@id</code> .

- Notice that steps need to be separated by commas. For example, look at lines 6, 10, and 14 of `readtour.js`.
 - Notice that steps need to be surrounded by curly brackets `{ }`. You can add additional steps.
3. Save your Javascript file.
 4. Open `login.html` in a browser. Click the link for your version to see your tour.
 5. Repeat steps 2 - 4 until you are happy with your tour. (You can just refresh the `login.html` to see your changes after saving your Javascript file.)
 6. Upload to Git.

JSON Example

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"
    }
  ]
};
```