



## **Leveraging Investment in Documentation with Doc-to-Help**

*A Case Study by Point North Consulting*

<http://PointNorthConsulting.com>

### **Overview**

Our experience with *Doc-to-Help for Word* was very positive for Point North Consulting and our clients. The process we use that incorporates Doc-to-Help has been successfully repeated for multiple User Guide and Online Help client projects. Point North Consulting is a business process and computer consulting practice with a presence in Florida (Orlando), Colorado (Denver) and Southern California.

Among our clients' diversified needs is the requirement for very complete and well-written printable user reference guides as well as compatible online help systems.

Starting with a strong outline and structured document to address both objectives using Doc-to-Help proved to be a more efficient and better way to meet these goals for our clients. Whereas, typical online help efforts have too often resulted in a loose collection of help-topics that are inconsistent in structure and how to locate the information needed plus the printed help often has a poor structure for use as a user reference manual.

Two client examples illustrating the effectiveness of *Doc-to-Help for Word* are described in this paper.

### **Example 1: An Online Ticketing Application**

Point North Consulting was contracted to create the initial documentation for a very large and extensive web-based Online Event Ticketing solution that included optional modules that could be used independently as well as cooperatively with these basic requirements:

- *A printable user reference manual was needed to serve the needs of ticketing users and administrators, training and those evaluating the system for potential purchase.*
- *An online help system was also needed to make the user and reference manual information available using the HTML online help dialog box with its Table of Contents, Index of Keywords, Search and Favorites capabilities.*
- *A simple way to integrate Context-Sensitive Help using the F1-Help-Key from within all of the Ticketing Modules.*

The Ticketing User Guide project began with the development of an effective structure for the client *User Reference Guide* that provided for three of the modules with other optional solutions in separate reference guides. Focusing on the three primary modules, the necessary screenshots and reference materials were collected, organized and edited into a viable user reference guide in Microsoft Word that described each web-page and its detailed features and functions.

During user guide drafting process, the priority for completing an online help system increased – raising serious questions:

- *How to also provide an effective online help system without Doubling the substantial amount of time, effort and cost to both develop and provide on-going maintenance of the guides and online help?*
- *How to author the manual and also complete online help in the same general project timeframe?*

Rather than just copying guide material into help topics and duplicating effort and ongoing maintenance using a traditional Help tool and manually linking topics, Point North defined the following requirements and evaluated several help systems on their ability to satisfy the previously defined needs (above) and all of the following requirements:

- *A good Online Help system must provide the user with exactly the information needed while using the application with minimum effort to obtain it.*
- *Unlike guides and manuals that are typically read, Online Help must efficiently answer specific questions and needs for a variety of users from novice to expert.*
- *Help Text and Reference Material need to be modular and typically one or a few pages in length (i.e., a topic).*
- *Online Help must provide both: "How To" and "Reference" information.*
- *Online Help Information must be "Richly and Robustly Linked" to support efficient navigation to satisfy the variety of user needs.*
- *The Help solution needed to be affordable in price and in the full-lifecycle effort required to utilize the package.*

A number of free as well as popular help solutions were reviewed before evaluating the *Doc-to-Help for Word* solution from ComponentOne. All except Doc-to-Help suffered from the substantial "double work" cost for both development and maintenance. Traditional Help tools also add a lot more tedious work by manually linking individual topics together robustly to related topics, examples, etc.

Our evaluation of *Doc-to-Help for Word* revealed the following.

- Because Doc-to-Help provides extensive functionality for translating Word documents into a help system by mappings based on paragraph and character styles that were used in the original document, we were able to quickly configure the styles and features needed in Doc-to-Help for our initial trial pass for the client as a proof-of-concept.
- Feeding the 700-page illustrated document into Doc-to-Help took less than ½-hour before we had a very impressive online help system running that was 80% - 90% ready for actual use.
- We quickly determined that a few unfortunate choices had been made in the way some of the graphics, screenshots and other illustrations were formatted making them inconsistent with the targeted help system.

- By correcting these illustrations and graphics in the word document, the initial problems were easily resolved using Microsoft Word before making another pass through Doc-to-Help.
- We were impressed by the way that Doc-to-Help also preserved the important organizational strength designed into the User Reference Guide allowing it to generate part of the rich and robust linking of individual help topics as well as preserve this organization in the generated Help Contents and Index elements.
- The original 700-page guide document was around 40 MB in size and very awkward to load into Word plus it was difficult to share with reviewers due to its large size. Also, this documentation would continue to grow with future application developments and the additional modules to be documented.

Doc-to-Help allowed us to break the original guide up into many smaller source Word modules that were much more convenient to work with plus share with reviewers and contributing authors.

- The Glossary in the original guide was easy to convert to use the *Glossary Headings* for terms and *Popup* paragraph styles for the term-definitions providing a Glossary chapter in the guide and help system as well as automatically propagating highlighted terms as popup-links everywhere the glossary terms are used within all of the source Word modules.
- The Doc-to-Help Word Add-Ins such as the *Add-Topic-Link* button is very convenient to use to create additional explicit links that either popup or jump to provide the user with the linked topic information within the same module or across source modules.
- Context-Sensitive integration of the Help System with the web-based application is provided by automatic generation of context id numbers and link names by Doc-to-Help for all generated topics and figures (i.e., mid-topics) such as screenshots of web-pages with complete explanations of all features and functions below.

Upon clicking the F1-Help-Key, the application can easily cause the appropriate Topic or Figure to be displayed that shows the screenshot and its full explanation for the web-page the user is currently using.

- We used the *Add-Topic-Link* button to easily convert the original page number references to links in the source Word modules so they appear as active links in both the Online Help and PDF format of the User Guide.

- Although Doc-to-Help provides many additional add-in features, this one button served most of our immediate needs for explicit links and navigation controls since a “rich and robust” set of implicit links were automatically generated and maintained by Doc-to-Help by making full use of the design and organization of the original guide.
- The client staff was able to assume all support plus ongoing development and maintenance for the documentation in concert with their ongoing web-based application solution developments as phase 2 and beyond.

As a first step, the client added an additional “How To” module that just appears in the online help system, not in the guide, to meet specific online help needs for concise step-by-step procedures that benefit from the ability to link directly to user reference topics as popup information when needed.

The use of selective popup windows allows the user to stay in the step-by-step procedure flow and return while still able to see the related information as needed.

As a result of phase 1 for this project, both a User Reference Guide and an Online Help system were established with only a small increase in effort -- saving an estimated initial effort of four months to complete the online help system using traditional help tools.

In addition, we were able to establish a documentation- and help-architecture for the client based on Doc-to-Help using a “Single Set” of Modular Word Source documents that provides for ongoing maintenance savings.

The *Doc-to-Help for Word* is based on the familiar Microsoft Word tool and the client was able to learn and begin using the initial document as a framework to continue documenting with Doc-to-Help after only a couple of hours of TOI (Transfer of Information).

### ***Example 2: A Medical Healthcare Application***

This client needed to document and provide an online help system for their new Medical Healthcare solution. Point North was able to repeat this process by merging material from their preliminary features manual, web-site material and other information to create an initial User Reference Guide for this web-based solution quickly and add necessary content to complete each topic using Microsoft Word.

This effort, likewise, resulted in a modular Word document source that Doc-to-Help is able to generate as an HTML Online Help system and User Guide formatted as an Adobe Acrobat PDF document by maintaining a single set of Word source modules with the many benefits mentioned in first example.

The key benefits of using *Doc-to-Help for Word* for this client are:

- The Adobe Acrobat PDF (Portable Document File) format for the User Guide is an industry standard for the electronic distribution of documentation in a protected non-alterable format that can be: Printed, Downloaded and Viewed Online (remotely or locally).
- This client especially liked the common source maintenance economies and the modularity that allows them to assign responsibility for both web-application components and their associated documentation to the same individuals as a part of an integrated development and release plan for their software solutions.
- Having an efficient way to apply updates once in one place that provides consistent information in both the guide and the help system is extremely important.
- The ability to selectively generate the guide manual in PDF format and online help for different combinations of their product solutions that may be used independently or cooperatively adds additional value to their ability to manage custom release content.
- In a short four-week period of time, basic documentation content was created plus turned into a maintainable and organized framework for their initial online Help and PDF User Guide – A key concern for a dynamic and developing software product solution.

In a couple of hours of TOI (Transfer of Information), development staff members were able to understand the completed framework and the *Doc-to-Help* product so they may continue to produce and maintain documentation in synchronization with the development of their web-based application.

### ***Summary***

During our evaluation and initial use of *Doc-to-Help for Word* using the 30-day free trial, we were very impressed with the pro-active and responsive attention of the *ComponentOne* support staff.

Although we completed the online help system well within the initial 30-day free trial period for the client, we recognized its potential value and we purchased *Doc-to-Help for Word* product to continue to use it to benefit other clients.

Likewise, our clients are pleased to know that there is no royalty or ownership restrictions on their generated help and manuals in Word and Adobe Acrobat PDF format. Each of these clients is continuing to use *Doc-to-Help for Word* to leverage its effective development and support capabilities for their family of software products.