

AUTOMATION

BOOTCAMP!

cPanel Conference '10

OCTOBER 4TH-6TH, 2010

Best Practices for Documenting Technical Procedures

Melanie Seibert

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Hello. This is me:

- ★ BA & MA in English
- ★ 5 years as a copywriter (both print & web)
- ★ 3 years as a part-time freelancer/full-time mom
- ★ 3 years total as a tech writer (2 at cPanel)
- ★ Now Documentation Supervisor at cPanel
- ★ Interested in how content is developed, managed, understood, and used

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

What about you? Are you a...

- ★ Technical support person?
- ★ Developer?
- ★ System Administrator?
- ★ Executive?
- ★ Something else?

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

If you're here, you're also a
content producer.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

The problem

information



Expert
(you)

needs to get here



Audience

Documenting Procedures

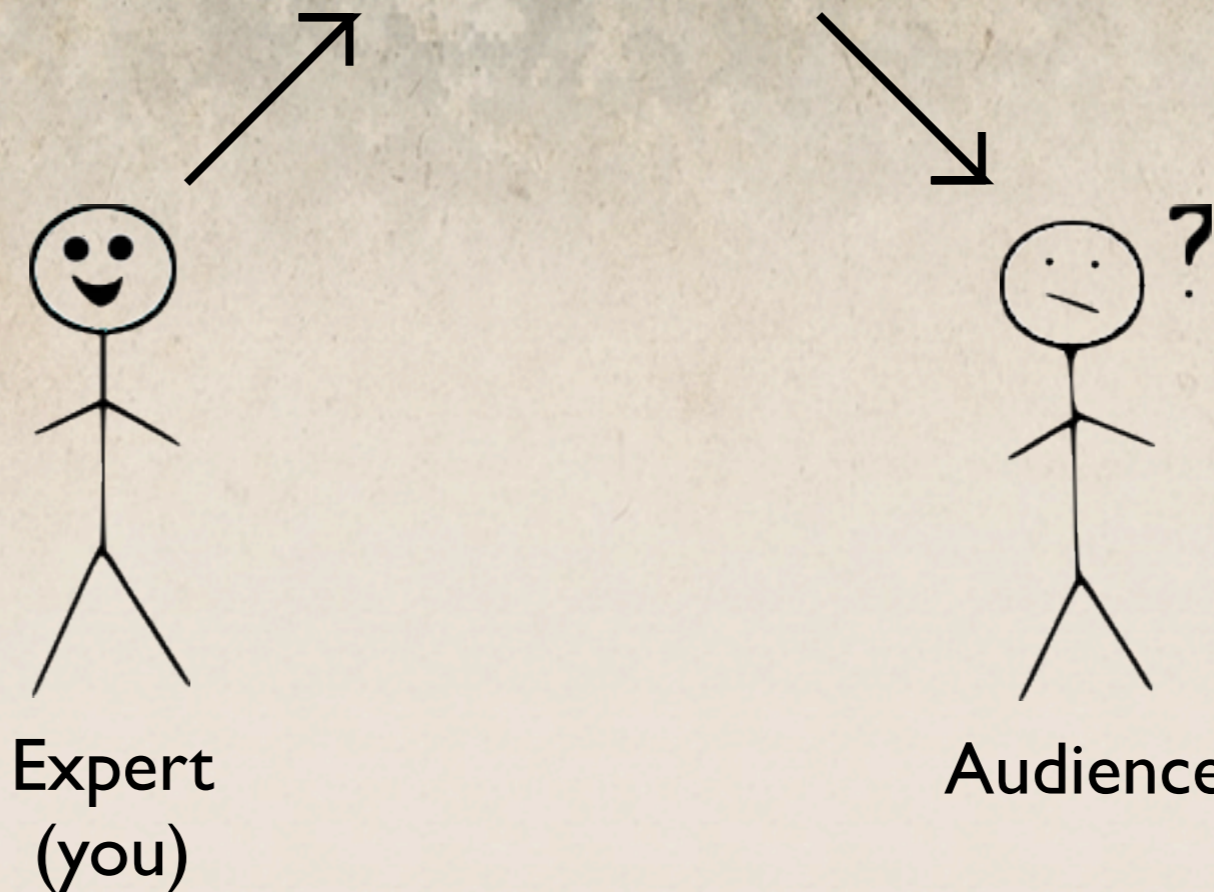
OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

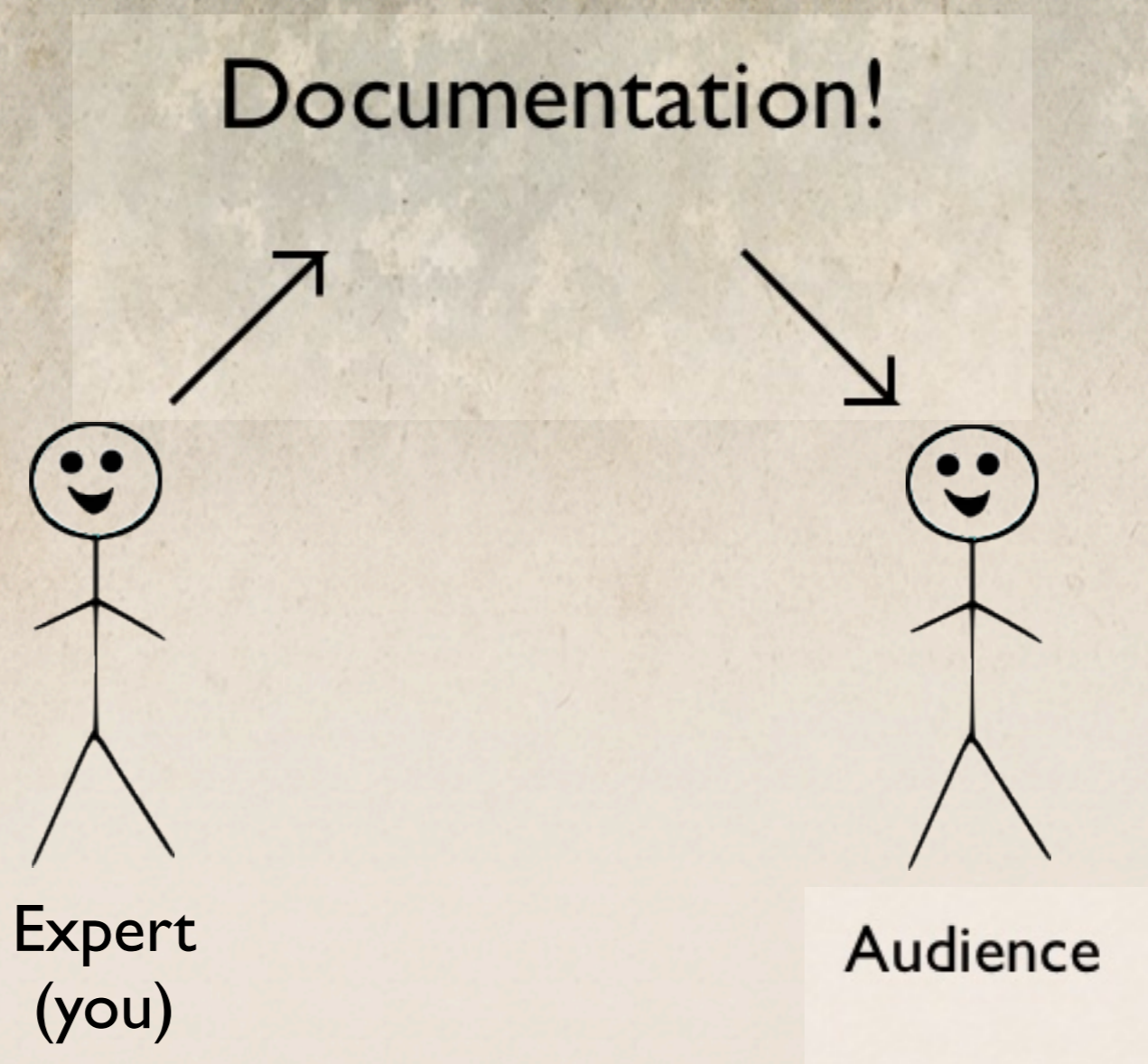
cPanel Conference '10

Documentation!



Documenting Procedures

OCTOBER 4TH-6TH, 2010



Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

How?

1. Plan.
2. Write.
3. Revise.
4. Edit.
5. Publish.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

1. Plan.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

~~What do I want to say?~~

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Who is my audience?

What do they know?

What do they need?

How will they be looking
for the information?

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

About Us

We are a leading Technology Services Provider focused on delivering Business Optimisation through Technology. Based on our F1 methodology we aim to empower people and processes across business-silos through tailor-made integration solutions delivering seamless collaboration and unified business information throughout the organisation. Our methodology clearly determines 'where' and 'how' Platforming should be implemented to empower workers to rapidly access and interact with targeted business processes and data in a collaborative manner.

We maintain onshore and offshore IT professionals with deep technical expertise to leverage and deliver benefits of globalised innovation. Together with accreditations and strong partnership with industry leading vendors such as IBM and MindTouch, we are ideally placed to advise and to support your business platforming and mashup requirements.

Documenting Procedures

OCTOBER 4TH-6TH, 2010



- ★ We usually assume people know what we know. We almost never start at a level too basic.
- ★ We usually assume they want to know what we want to tell them.
- ★ Many times, what we want to tell them is mainly about us.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

So...

- ★ Start at the beginning.
- ★ Listen and learn what your audience wants to know.
- ★ Make it about them, not you.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

This results in:

In many companies, departments learn to function by maintaining their own data. But this can cause problems, like duplication of effort and inaccurate reports. These problems, in turn, lower employee morale and customer satisfaction.

We help companies integrate and unify data across the entire enterprise. This leads to more efficient work processes, happier employees, and greater customer satisfaction.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

2. Write badly.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Everybody knows you should do things right the first time... right?

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Do things badly the first time... just don't leave them that way.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Why?

- ★ Being perfectionistic will get you “stuck.”
- ★ You don't do anything wrong. Because you don't do anything.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

In writing, anything is better than nothing. So, write a terrible first draft.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

3. Revise.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

This is where it gets good.

Do not skip this step.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION
BOOTCAMP!

Example

```
01. <link rel="stylesheet" href="css/iphone.css" type='text/css' media='all' />
02. <script type="text/javascript" src="js/jquery.js"></script>
03. <script type="text/javascript" src="js/jquery-ui.js"></script>
04. <script type="text/javascript" src="js/jquery.disable.text.select.js"></script>
05. <script type="text/javascript" src="js/jquery.mousewheel.js"></script>
06. <script type="text/javascript" src="js/ui/ui.iScroll.js"></script>
07. <script type="text/javascript">
08. $(document).ready(function(){
09.     // jquery.iphone.js have autoloader, but you can use
10.     // alternative method of init widget
11.     // set height here
12.     $(".scroll").iScroll({height:200});
13. });
14. </script>
15. <style type="text/css">
16.     .scroll {
17.         /* or set height like this */
18.         height:200px;
19.     }
20. </style>
21. <div class="scroll">
22. Lorem ipsum ...
23. </div>
```

Demo

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut lacinia quam nec enim scelerisque porta. In ut lorem ipsum. Proin iaculis viverra rutrum. Maecenas quis ante enim. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Vestibulum luctus tristique feugiat. Morbi dictum est dolor, at condimentum nisl. Ut id nunc augue, at luctus enim. Phasellus urna nunc, aliquam sit amet rutrum ac, imperdiet in nunc. Cras mattis massa et est sodales ac auctor mi sagittis. Fusce elementum ultrices nunc, eu scelerisque massa sodales quis. Aliquam bibendum accumsan nibh ut blandit. Vestibulum suscipit leo vitae magna tincidunt pharetra. Sed consequat, ligula non pretium ultrices, ligula enim venenatis urna, in scelerisque urna turpis vel neque. Praesent nibh urna, eleifend et fringilla eu, pellentesque sit amet nisl.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Create a logical flow.

- ★ Think like your reader.
- ★ Question and answer format often works well.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Be concise.

- ★ Don't waste your readers' time.
- ★ Be ruthless.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

“Vigorous writing is concise. A sentence should contain no unnecessary words, a paragraph no unnecessary sentences, for the same reason that a drawing should have no unnecessary lines and a machine no unnecessary parts.”

— Strunk & White, The Elements of Style

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

“Get rid of half the words on the page, then get rid of half of what’s left.”

— Steve Krug, Don't Make Me Think

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Example:

Operating System End of Life Policy for cPanel/WHM

As Linux operating systems age, they become increasingly difficult for cPanel to support while providing the level of functionality our customers expect.

If you choose not to update your operating system, you should understand how cPanel handles legacy operating systems reaching their End of Life (EOL) dates.

- ↓ [What is "End of Life" \(EOL\)?](#)
- ↓ [How does cPanel determine an operating system's EOL?](#)
- ↓ [What is an OS's "lifetime"?](#)
- ↓ [What happens when an operating system reaches EOL?](#)
- ↓ [Where can I find the EOL date for my OS?](#)
- ↓ [What should I do if my OS has reached, or will soon reach, its EOL date?](#)
- ↓ [Example](#)

What is "End of Life" (EOL)?

For our purposes, *End of Life* describes the point at which cPanel, Inc. will no longer support a particular version of an operating system (OS).

How does cPanel determine an operating system's EOL?

cPanel will support a [specified operating system](#) for the [lifetime](#) of the OS, plus an additional six months.

What is an OS's "lifetime"?

The *lifetime* of the operating system is set by the OS's vendor. We define it as the period of time that the vendor will continue to provide patches, fixes, and other errata.

What happens when an operating system reaches EOL?

An OS that reaches End of Life will continue to function. An existing cPanel/WHM installation on a system that reaches EOL will continue to function.

However, you will be unable to perform the following tasks on an operating system that has reached its EOL:

- **Perform a fresh installation** of cPanel/WHM. *New installations are prevented once the OS reaches the end of its lifetime*
- **Upgrade to a newer version** of cPanel/WHM. *Upgrades are prevented starting at EOL.*

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

What I did:

- ★ Formatted it as Q&A.
- ★ Used headings and bullets.
- ★ Defined basic terms.
- ★ Answered the most pressing questions first.
- ★ Removed unnecessary information.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Why it works:

- ★ It's easier to scan.
- ★ It's approachable.
- ★ It's understandable.
- ★ It's friendly.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Another
example:

The CPANEL PHP Class

Class Description

Class Description [Class Variables](#) [Class Methods](#)

This class provides an interface to the local system cPanel tags as described in [Developer Resources](#).

- **Version:** 0.1 — You can find this class at [/usr/local/cpanel/php/xml.php](#).
- **Copyright:** cPanel, Inc.
- **License:** Modified BSD
- **Note:** This class depends on [/usr/local/cpanel/php/xml.php](#).

Class Method Details

CPANEL (line 36)

Description	Get user scope socket handle to cPanel binary. (e.g. Constructor)
Return	<i>Nothing.</i>
Access	<i>Public</i>
Example	CPANEL ()

api (line 99)

Description	Queries the <code>cpsrxd</code> binary for information.
Return	A PHP array representation of an XML response.
Access	<i>Public</i>
Output Type	<i>Array</i>
Example	api (\$reqtype, \$version, \$module, \$func, \$args)

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

What the writer did:

- ★ Used a table to format details.
- ★ Used bullets.
- ★ Used tabs to display categories of information.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Why it works:

- ★ It's easy to scan.
- ★ The information is organized logically.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

4. Edit.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

- ★ Have someone proof your document before publishing.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10



huffingtonpost.com



huffingtonpost.com



typobuddy.com

cPanel

Documenting Procedures

OCTOBER 4TH-6TH, 2010



- ★ Test it: watch someone “use” your document and listen to their thoughts.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

5. Publish.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Points to consider before publishing:

- ★ Who are your users?
- ★ Where will they look for info?
- ★ Do they want print? web? mobile?

Documenting Procedures

OCTOBER 4TH-6TH, 2010

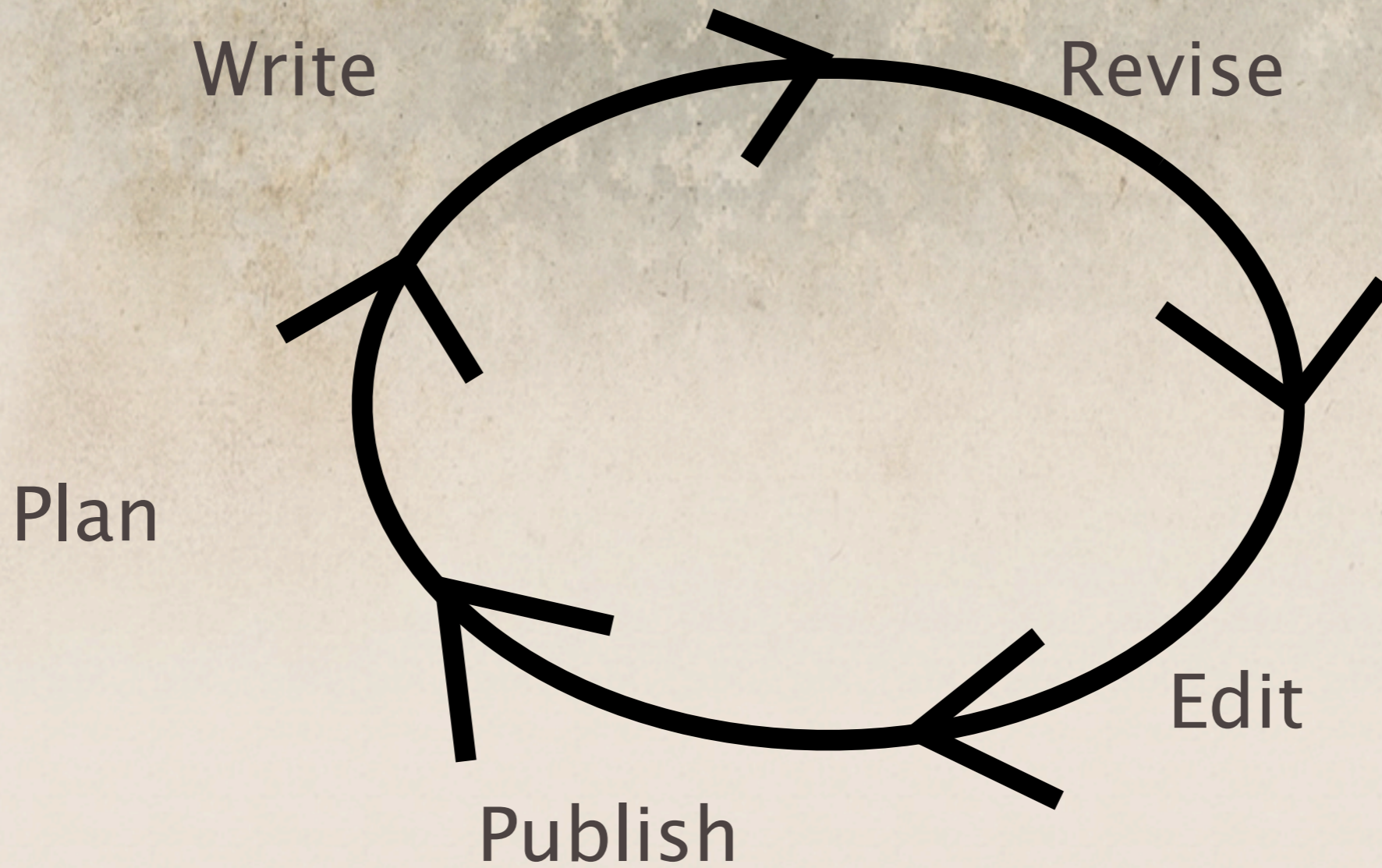
AUTOMATION

BOOTCAMP!

cPanel Conference '10

You're ~~not~~ done

never :)



Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Points to consider after publishing:

- ★ Long-term maintenance: who will do it?
- ★ Conventions: consider starting a style guide.
- ★ Consider a site audit or inventory if you have lots of documentation.

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

Resources:

- ★ Yahoo! Style Guide
- ★ Don't Make Me Think by Steve Krug
- ★ Letting Go of the Words by Ginny Redish

Documenting Procedures

OCTOBER 4TH-6TH, 2010

AUTOMATION

BOOTCAMP!

cPanel Conference '10

A simple black line drawing of a stick figure with a smiling face. To its right is a speech bubble containing the text "Thanks!".

Thanks!