



Documenting Workflows

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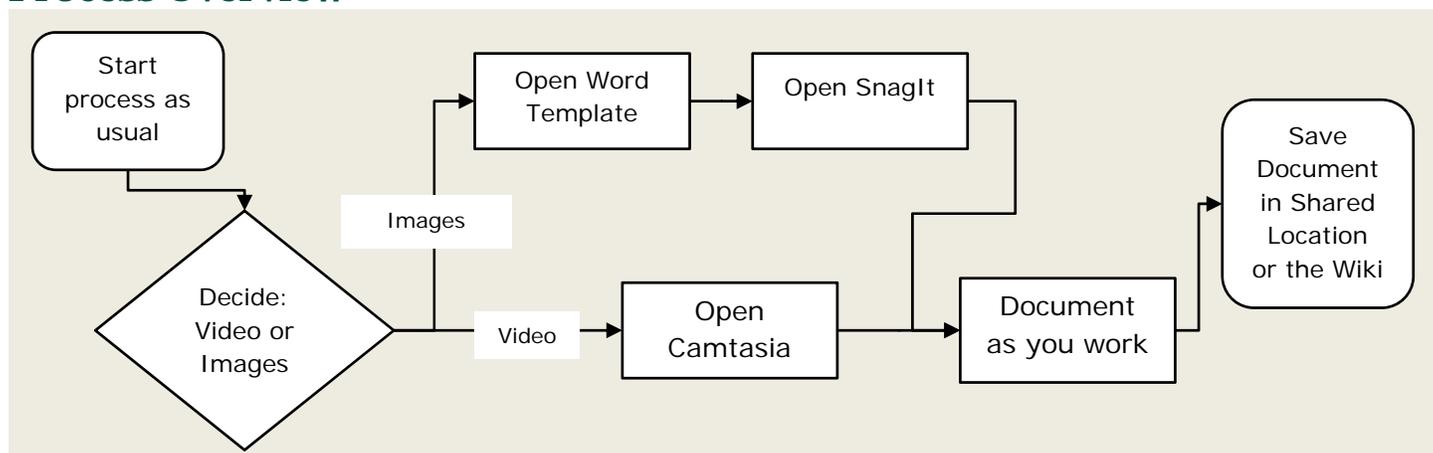
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Introduction

When you are documenting your workflows, in a sense, you are providing training material for another person to do the job. Here are some tips to get started:

- **Less is more:** Simplify the process to the simplest approach and least number of steps possible. Simplify the presentation of the information so that the document contains only what is required and is presented as clearly as possible. Avoid irrelevant information, such as the history of a process, unless it contributes to the motivation of the learner (e.g. demonstrates why the process is important, negative consequences of not following it properly, etc.)
- **Think like a novice:** If you are experienced in this process, try to think like you are new to it or ask someone less familiar with the process to test your documents. As an expert, you may skip steps or combine multiple steps in ways that a novice may find confusing.
- **Provide the big picture:** Help the learner develop an overall concept of the process that they can fit the tasks or steps into. You may or may not be there when they are learning the process. One way to do this is with a process map. Below is a simple example of a process map for the workflow documentation process.
- **Include Background information:** You will often be describing procedures, but it may be helpful to include some supporting information at the beginning or end of your documentation. Some examples might include:
 - Key roles/personnel
 - Acronym definitions
 - Computer system definitions
 - Frequently asked questions
- **Organize the Files:** Set up a common folder for all the files related to a project. Consider adding subfolders for each asset type:
 - Audio
 - Documents
 - Images
 - Video
- **Use the template:** Using the documentation template described in this document reduces the time and effort required to document the workflow.

Process Overview

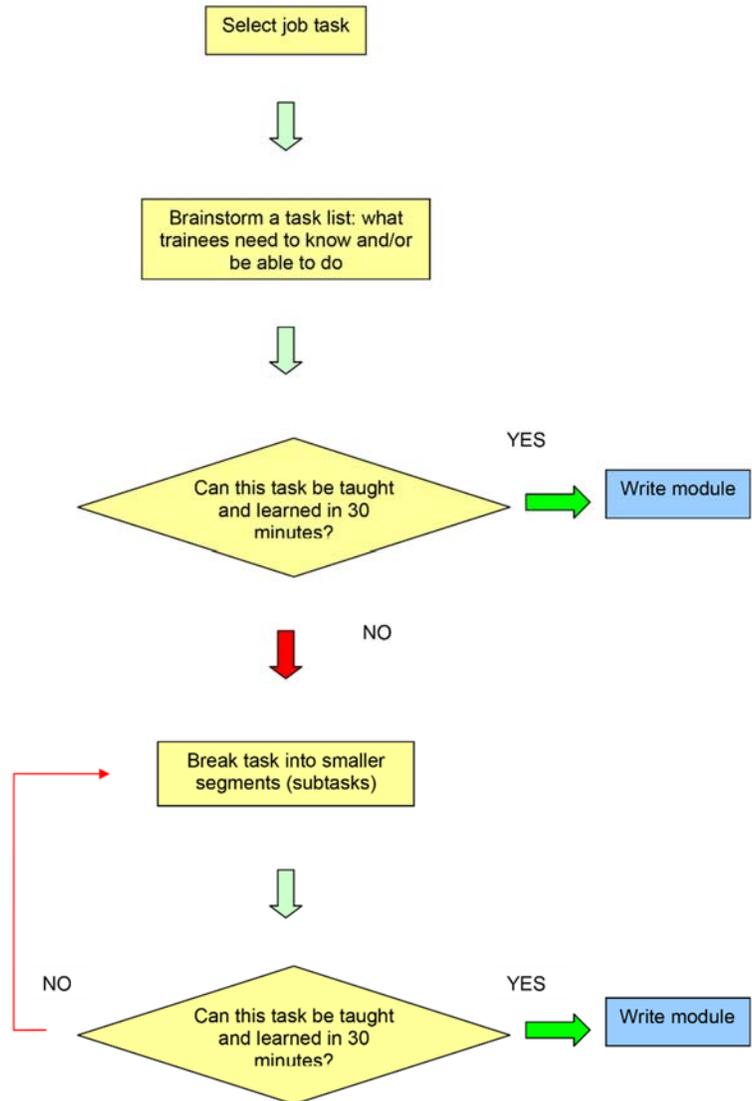


Task Analysis

You can jump right in on a task you are currently performing or do a simple task analysis. To do a task analysis, start a document and write down the primary responsibilities of your job. Divide these job duties into tasks. This task may have multiple subtasks. Subtasks would ideally contain between 5 to 9 steps and be able to be completed within 30 minutes. If a task or subtask contains too many steps or takes too long to complete, try to break it down further into additional meaningful subtasks.

Why 30 minutes:

- Provides opportunities for practice
- Fits attention span
- Provides manageable blocks of material for ease of instruction and learning
- Allows flexibility in situations where operating conditions require short periods of training
- May be easily modified as specifications, processes, procedures, equipment, etc. are updated
- Gives trainee sense of accomplishment
- Allows for immediate and specific feedback



From: *USDA National Resources Conservation Service*
http://www.nrcs.usda.gov/Internet/FSE_DOCUMENTS/nrcs142p2_051333.pdf

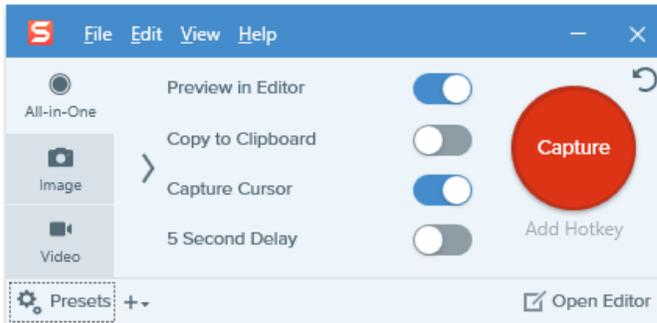
Setting up Programs and Files

Setting up SnagIt

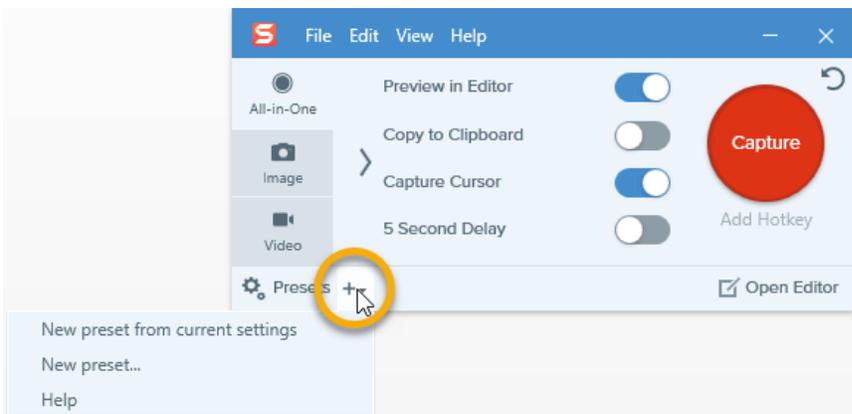
1. Open SnagIt by double clicking on the icon in the System Tray, located in the lower right corner of the screen.



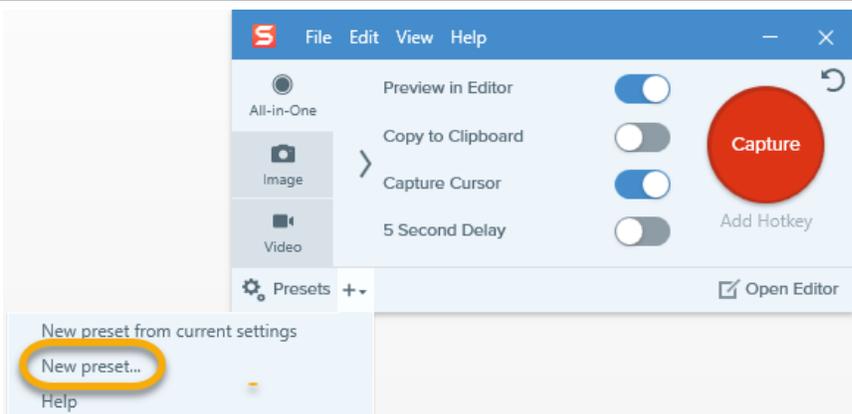
2. The SnagIt window will open.



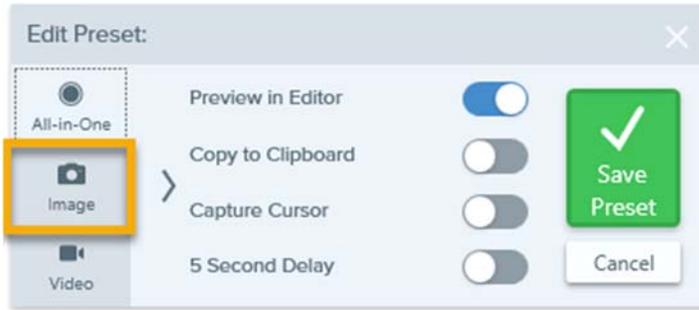
3. Select the + sign beside Presets.



4. Select New preset...

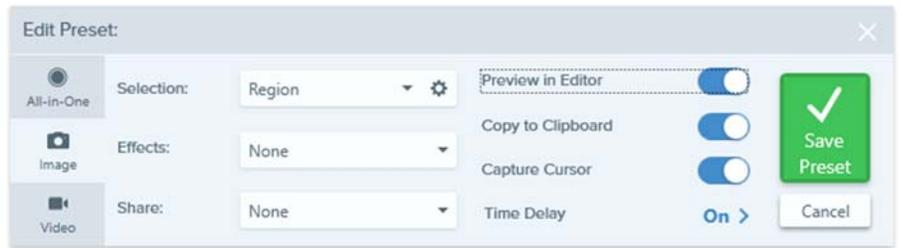


5. The Edit Preset dialog box will open. Select Image.

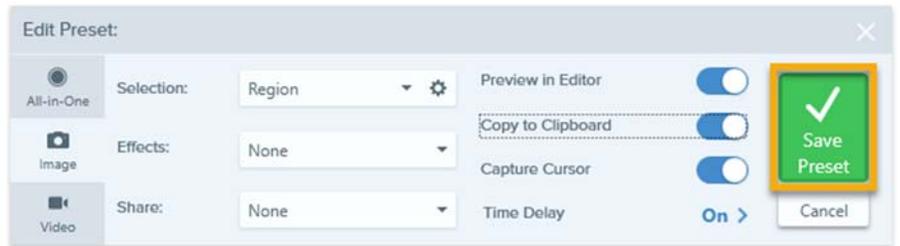


6. Use the following

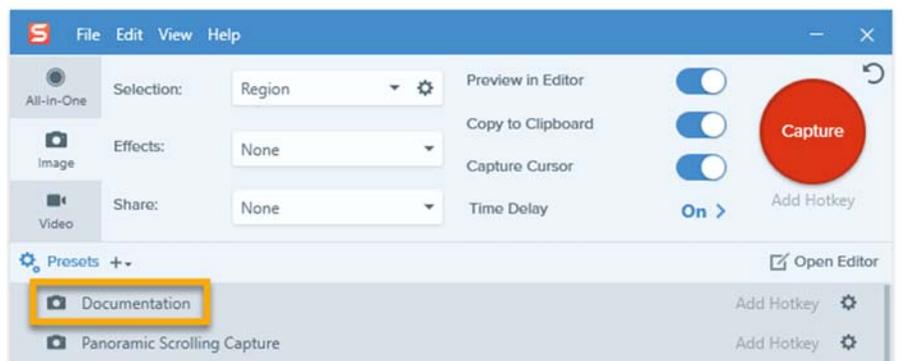
- Selection: Region
- Effects: None
- Share: None
- Preview in Editor: On
- Copy to Clipboard: On
- Capture Cursor: On
- Time Delay: On
3 Seconds
- CTRL+ALT+C
(Choose a hotkey that doesn't conflict)



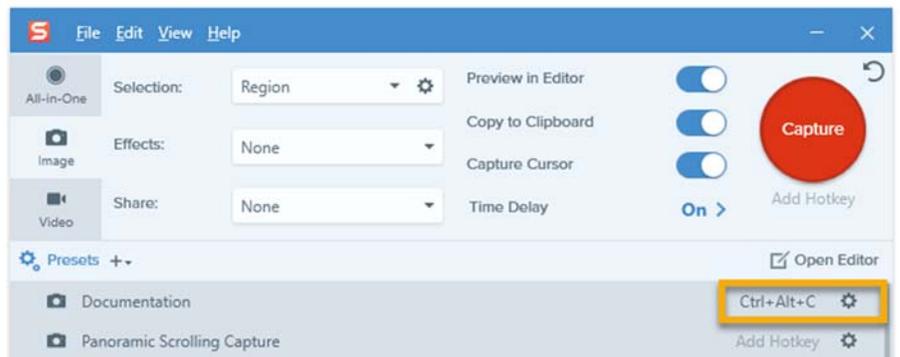
7. Select Save Preset.



8. Rename the preset "Documentation"



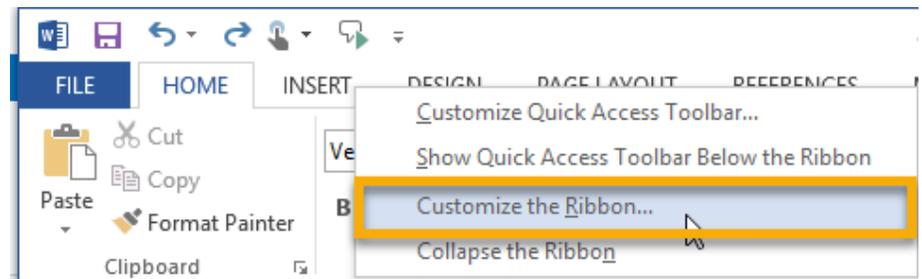
9. Add a hotkey by clicking in the "Add a hotkey" box and press CTRL + ALT + C.



Setting up the Ribbon in Microsoft Word

This will only need to be done once. If you have customized the ribbon yourself prior to this, please know that this process will eliminate your customizations.

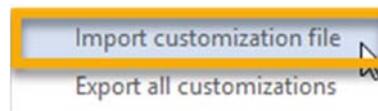
1. Right Click on the Ribbon and Select Customize Ribbon.



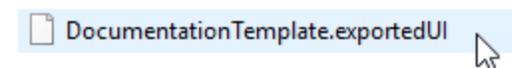
2. Select the Import/Export button.



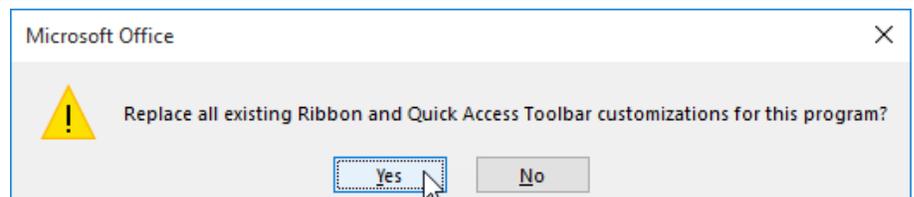
3. Choose Import customization file.



4. Browse for the file named "DocumentationTemplate.exportedUI"



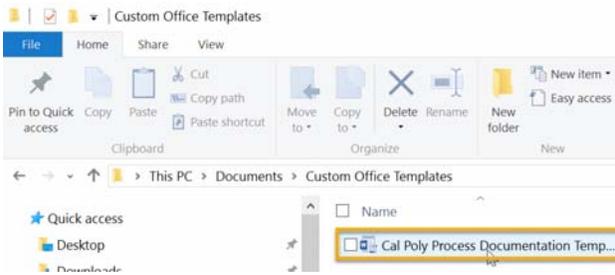
5. Select Yes to replace the existing Ribbon customizations.



Setting up the Template in Microsoft Word

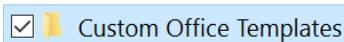
Following this process will help keep the Quick Parts from “disappearing.”

1. You should have a copy of the MS Word template named “Cal Poly Process Documentation Template.”

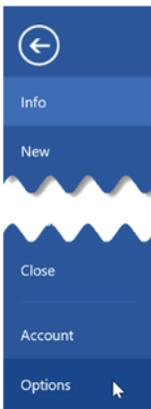


2. Save the template in Documents > Custom Office Templates.

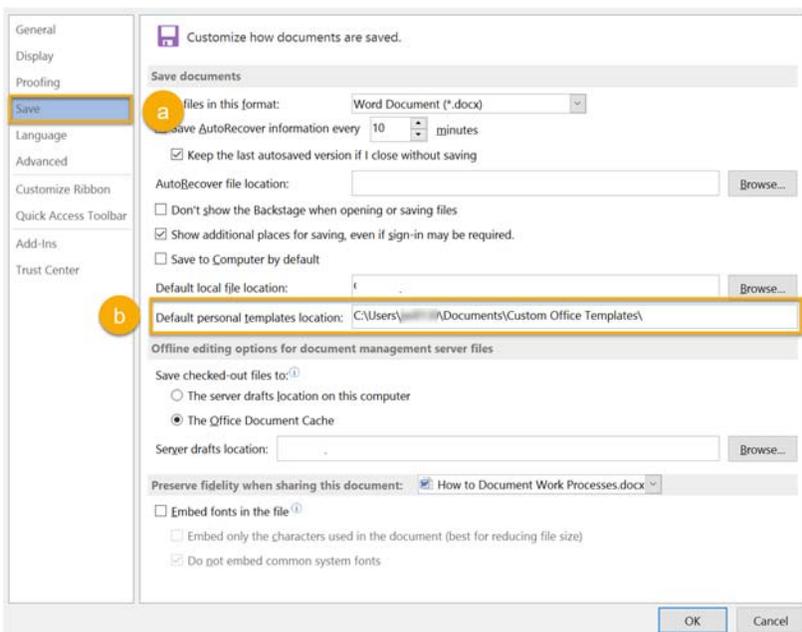
Note: If the folder doesn't exist, you can create it.



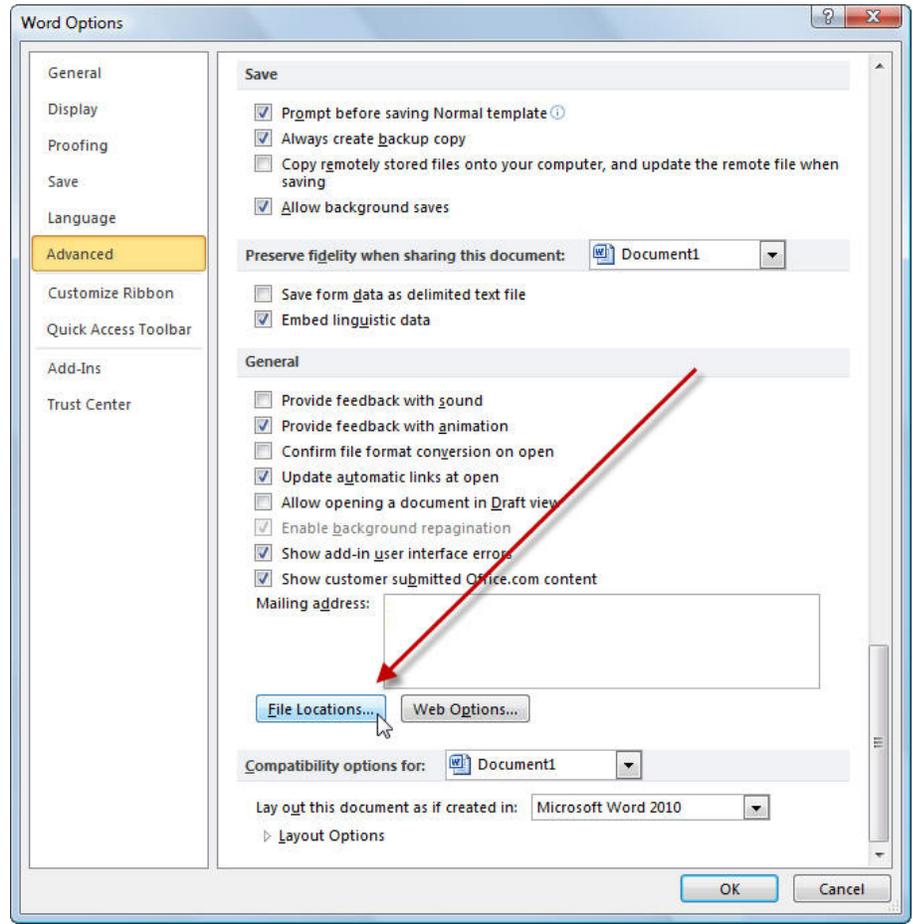
3. Click on the File tab and choose Options.



4. In Word 2013: Select Save and change the Default personal templates location to: C:\Users\username\Documents\Custom Office Templates



- In Word 2010: Select Advanced > File Locations (button near bottom). Then, select User templates and click the Modify... button. Change the location to:
C:\Users\username\Documents
\Custom Office Templates



Getting Started with Documentation

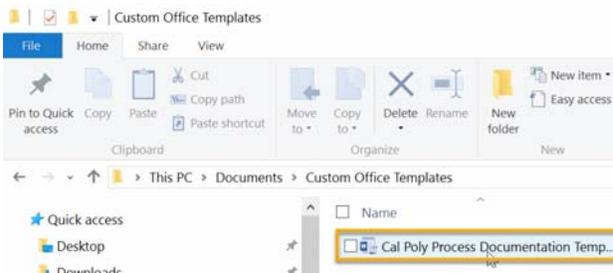
Using the MS Word Documentation Template

The MS Word template, combined with the Training Guides tab on the Ribbon, is designed to streamline the process of creating documentation and help make documentation more uniform. This process relies on the use of Quick Parts to place tables into a document. The tables have the steps in the left column and an example, image or description in the right column that corresponds to the step.

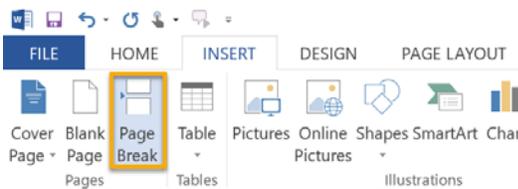
1. The template should be located in Documents > Custom Office Templates



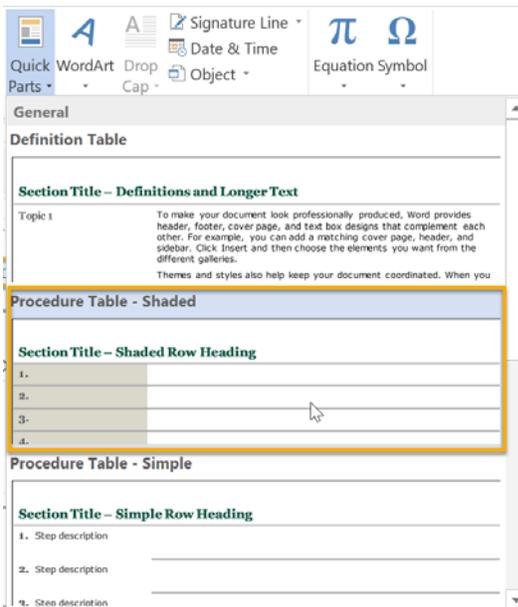
2. Create a document based on the template by double-clicking on the template file.



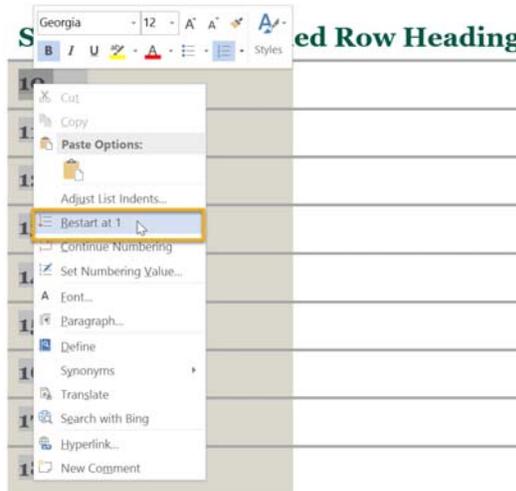
3. Start a new page by selecting Insert > Page Break



4. Add a pre-formatted table by selecting Insert > Quick Parts and Choose a Table that meet your needs.



5. When adding a second table, numbers will continue from the previous table. To reset the numbers, right-click on the first number in the list and select Restart at 1.

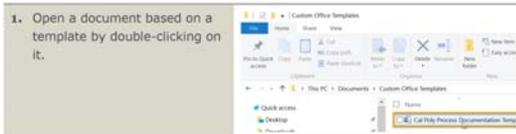


6. Add a brief description under the heading for the table.

Using the MS Word Documentation Template

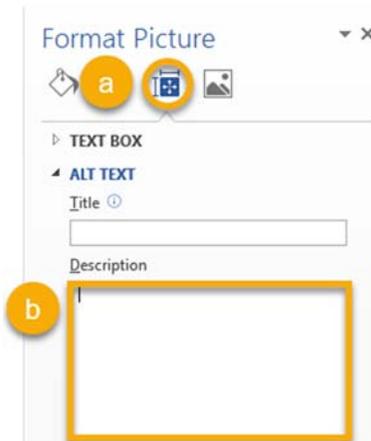
The MS Word template, combined with the Training Guides tab on the Ribbon, is designed to streamline the process of creating documentation and help make documentation more uniform. This process relies on the use of Quick Parts to place tables into a document. The tables have the steps in the left column and an example, image or description in the right column that corresponds to the step.

7. Type the first step in the left column.
 8. Paste the corresponding image from SnagIt, in the right column and resize it.

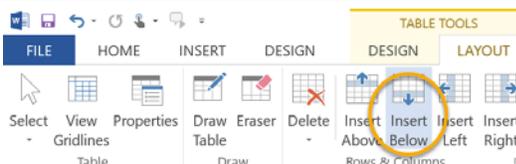


9. To increase the accessibility of the document, add an alternate description to the image by right-clicking the image and selecting Format Picture...

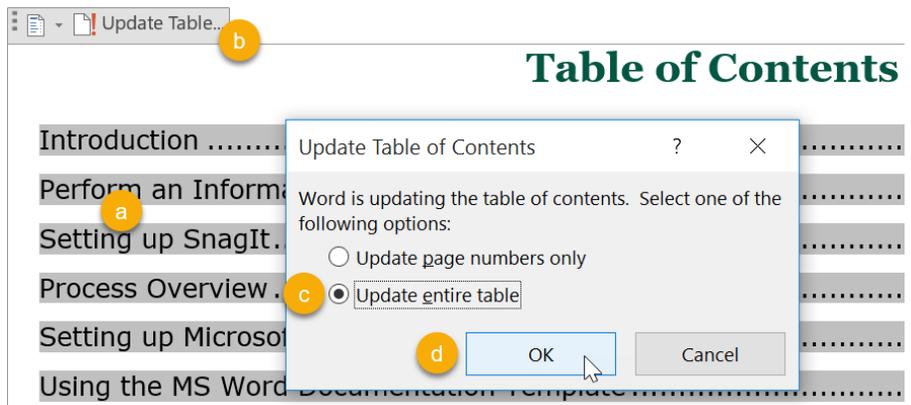
- a. In the Format Picture pane, Choose Layout and Properties
- b. Add a Description.



10. To add additional rows, select Table Tools > Layout > Insert Below.



- 11.** To automatically update the Table of Contents:
- Click in the Table of Contents
 - Select Update Table...
 - Choose Update entire table
 - Click OK



Tip:

Depending on your needs, consider adding tables/sections for Definitions, FAQs, Resources and/or Troubleshooting Common Problems.

Capturing Screens with SnagIt

The instructions below assume that the keyboard shortcut for SnagIt (described in a previous section) has been put in place.

1. Be sure the screen you are working with is visible and you are at the step in your process that you would like to capture.



2. Press CTRL + ALT + C. There will be a delay of 3 seconds.



3. Decide if you need a Menu or Cursor.

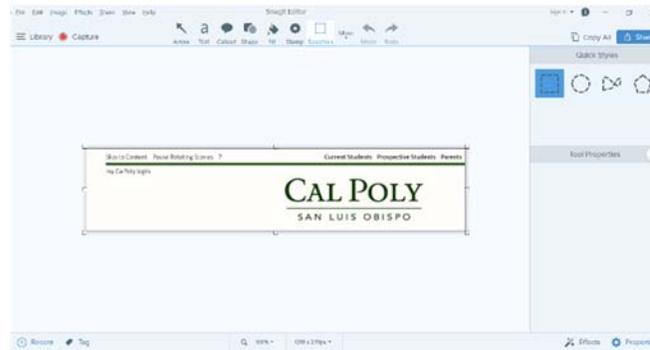
Menu: The time delay allows you to capture an open menu.

Cursor: If you want to include the cursor, place it in the appropriate location for the screen shot. If you do not want to include the cursor, move it out of the area you will capture. You can also delete the cursor later using the SnagIt editor.

4. Section or Whole Window?
 - a. **Section** - Drag a box around the portion of the screen that you want to capture.
 - b. **Window** - Click on a window or dialog box to capture the entire dialog box.



5. The screen image will be copied to the clipboard. The image will also open in the SnagIt editor so that you can edit it if desired.



6. Editing the image?

No: If you do not need to edit the image (e.g. to add highlights), then you can close the SnagIt editor and paste the image into your documentation.

Yes: Use SnagIt to edit the image as described in the next section.



Tip:

Capture only the portion of the screen that is necessary to convey the meaning, while providing enough information to understand the context and so that the user can find the correct location.

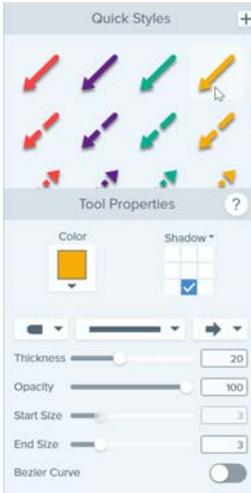
Using the SnagIt Editor

With the SnagIt settings that were put in place in a previous section, the editor will open automatically when a screen is captured.

1. To add an arrow, click Arrow in the menu. To add a circle or rectangle, select Shape.



2. In the Quick Styles pane on the right, select the style you would like.
3. In the Tool Properties pane, adjust the settings as desired. For example, the thickness or color.



4. Click and drag to add the shape to your document.



Tip - Hold the Shift key while dragging a shape to make an arrow straight, or to create a perfect circle or a square.



5. Other helpful edits.

Note: These may appear under "More" in the toolbar.

Blur



Blur

Step
(Automatically numbered)

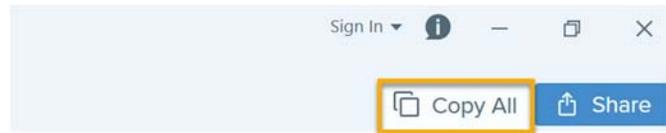


Step

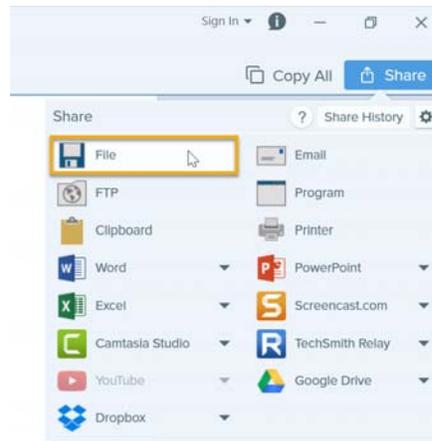
Shapes
(Circle or Rectangle)



6. To copy the image to the clipboard (to use in MS Word), select the Copy All button in the upper right of the SnagIt Editor.



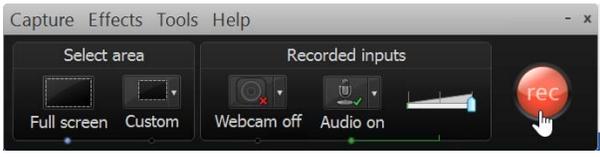
7. To use the image on the Wiki, select Share > File. Then, browse for a location to save the file.



Tip:

Consider avoiding the color red for highlights. Red has been shown to have a negative impact on learning.

Recording the Screen Using Camtasia

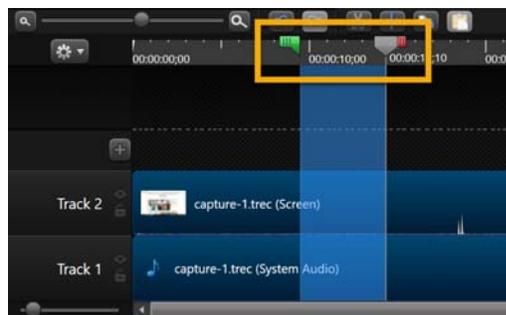
<p>1. Open Camtasia from the Start Menu.</p>	
<p>2. Select Record the Screen</p>	
<p>3. Select the red record (rec) button.</p> <p>Settings used:</p> <ol style="list-style-type: none"> Full Screen Webcam Off Audio On 	
<p>4. Tips while recording:</p>	<ul style="list-style-type: none"> • Talk through the recording process. • If you make a mistake, clap 3 times and keep going; you can remove the section later.
<p>5. Press F10 to stop the recording. Alternatively, select the Camtasia Recorder icon in the Taskbar and click Stop.</p>	
<p>6. Select Save and Edit, located in the lower right of the window.</p>	

Editing a Camtasia Screen Recording

1. Press play to review the video.



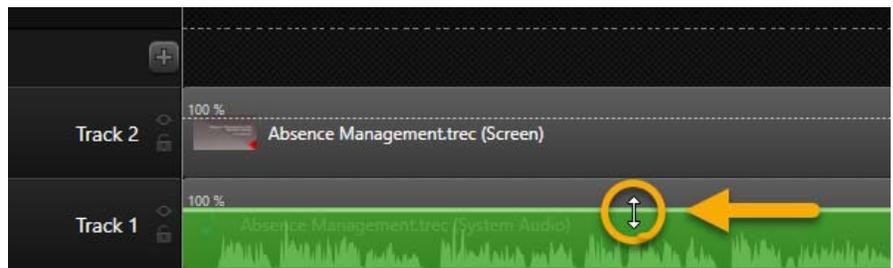
2. Select any errors by dragging the red and green handles to highlight the appropriate section. Remove the mistake by clicking the scissors icon or by pressing the CTRL + X on the keyboard.



3. To adjust the audio, select the Audio button.

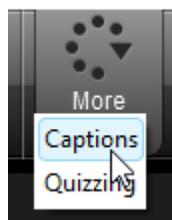


4. Drag the green line up or down to increase or decrease volume.

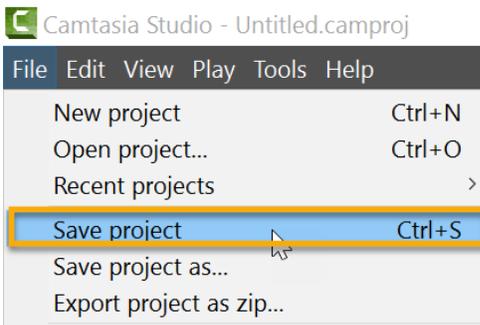


5. To add captions, select the More button and choose Captions.

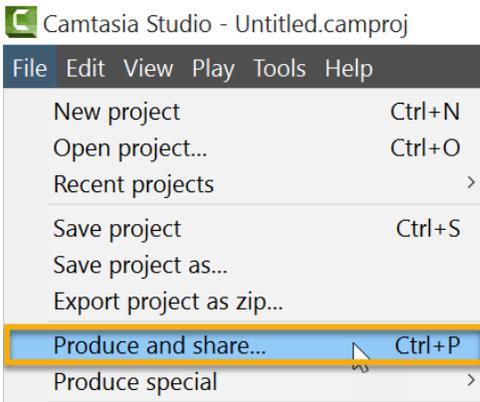
- Position the playhead where the caption will be added.
- Click Add caption media.
- Type text into the text box.
- If necessary, drag the caption ends on the timeline to sync the caption with the audio.
- Repeat for all remaining captions.



6. Select File > Save project to save the project so that you can edit it later if necessary.



7. Select File > Produce and Share... to create a video file.



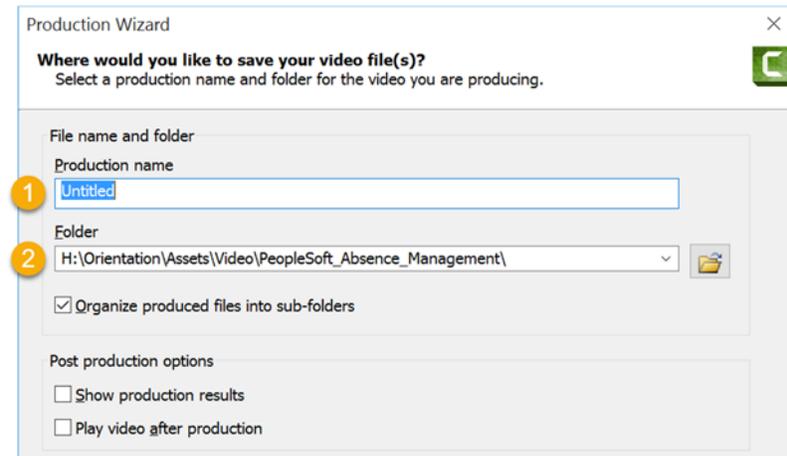
8. Select MP4 only (up to 1080p). Select Next.



9. Name the video, choose a location and select Finish.



Tip: Once saved, upload to the Wiki or place in shared location, such as your department's shared drive.



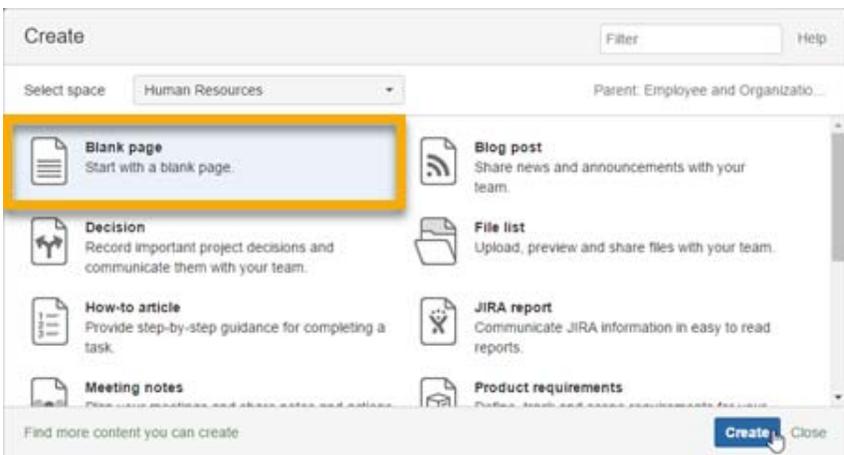
Using the Wiki Internal Documentation

1. Open the Campus Wiki from the Portal and access your department's Wiki space.

Note: If your department does not have a Wiki space and would like to begin using the Wiki, please contact IT.



2. Create a new blank page.



3. Add a descriptive title, such as "How to Book a Room"

How to...

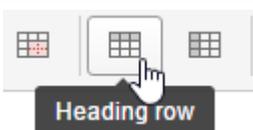
4. Creating headings on the page. Headings might include:

Introduction
 How to ...
 How to ...
 FAQs
 Additional Resources

5. Insert a table with two columns. Place your cursor in the new table.



6. Remove the Heading Row by selecting the Heading row button.

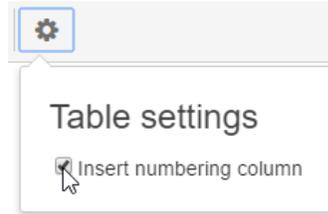


7. Add a Heading Column by selecting the Heading column button.



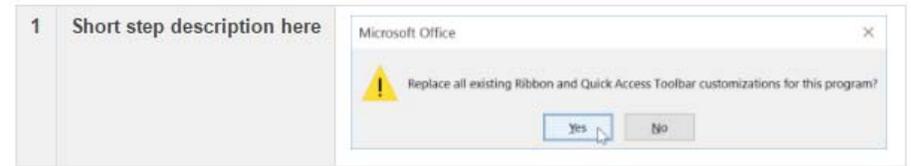
8. Select the gear shaped Table settings icon.

9. Check Insert a numbered column.

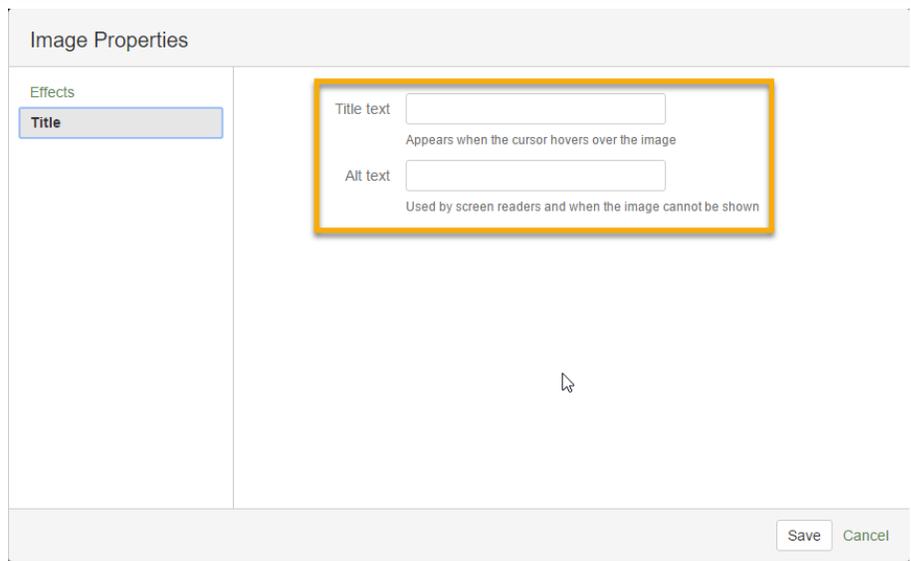


10. Add a brief step description in column 2.

11. In the third column, add the images or videos you created using SnagIt or Camtasia.



12. To increase the accessibility of the document, add alternate text by selecting the image and choosing Properties. Add a title and alternate (Alt) text that describes the image.



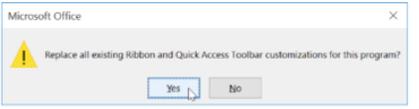
13. The final example might look like the following.

How to...

Introduction

Summary of the process and why it is important.

How to do X

1	Select Yes to replace the existing Ribbon customizations.	
2		
3		

How to do Y

1	Short step description here	[image here]
2		
3		

FAQs

Question	Answer

Additional Resources

Title	Link

Resources

Visit afd.calpoly.edu/training/ and select Toolkits > Documenting Workflows for more information and resources.

Task Analysis

- [USDA NRCS Template](#)
-

Creating a Process Flowchart

- [Flowcharts in Microsoft Word](#)
 - [Flowcharts in Microsoft Excel](#)
-

Using MS Word

- [Using Quick Parts](#)
 - [Using Styles](#)
 - [Using Templates](#)
 - [Using Tables](#)
-

Using the Wiki

- [Wiki Central](#)
-

SnagIt

- [TechSmith Video Tutorials](#)
 - Lynda: [Learn Snagit for Mac](#)
-

Camtasia

- [TechSmith Video Tutorials](#)
 - Lynda:
 - [How to Create Instructional Videos in Camtasia](#)
 - [Learn Camtasia: Advanced Techniques](#)
 - [Screencasting Fundamentals](#)
 - [Camtasia Studio 8 Essential Training](#)
-

All TechSmith Tutorials

<https://www.techsmith.com/tutorial.html>

Creating Documentation

Lynda: [Creating Procedure Manuals and Documentation](#)
