Documentation Workflow & Style Guide

*** *This is a living document. Suggestions, edits, and questions welcome.* ***

Workflow

Documentation Ideas & Requests

We use Flow for tracking documentation ideas and requests as well as progress from draft to review to publication. To post a documentation idea or request you can:
- Add a card to the **To Do** column on the [Flow Documentation Project](#).
- Post in Slack in the `#docs` channel.

Writing Process for New Docs

1. Choose doc to write from **To Do** column on [Flow Documentation Project](#).
2. Move card to **Up Next** column in Flow.
3. On Google Drive create a new doc in the [Extensions Docs folder](#).
4. Write draft.
5. On doc, highlight and comment on any parts that you have questions about or would like special attention.
6. When ready for review, move card to **Needs Review** column and post comment on card that includes:
   a. Shareable link for doc.
      i. On Google doc, in the upper right-hand corner, click the **Share** button to find and copy link. Make sure those with the link "can find and edit" the document.
   b. Mentions for those you want to review (`@name`).
      i. Note: Mentions will help people see it because usually they aren't subscribed. You can see who is subscribed at the bottom of the page when you click in the box to post a comment.
      ii. People to mention might include the developer responsible for the code or extension that the doc is about.
   c. Any notes for reviewers such as what to focus on (accuracy, structure, etc) and questions.
7. Repeat steps 4-6 until the final draft is reached.
8. Once the final draft is reached, post on WooCommerce Docs site.
9. When a doc is published, post an announcement in Slack. The `#docs` channel is a good one, but also crosspost in other relevant channels so that everyone who could benefit from it gets the news, like the `#support` channel.
   The doc can also then be moved to the "Published" sub-folder.

Writing Process for Existing Docs

For an existing document, the steps to writing are similar to new doc writing. Additionally, in the comments or on the doc, adding a link and explanation of where within a doc the changes or additions will be made are helpful.

Document Review Process

When a doc is up for review, keep an eye out for:
- Accuracy - is the information correct
- Format & Structure - does the flow make sense, does the doc look right
- Screenshots - is there enough context, is there enough specificity
- Specific questions the writer has asked about

When reviewing a doc, there are a few ways to leave comments or suggestions.
To ask a question:
- On a Google Doc, highlight the part in question or a piece of it and add a comment. Note: Depending on settings, a user might not be notified if you respond to a comment in G Docs. It is good to let them know that you have commented on the doc.
- Add the question in a comment on Flow.

To make suggestions or changes:
- On a Google Doc, in the upper right-hand corner change the mode from **Editing** to **Suggesting**. Then make changes to the doc. These changes will appear color-coded and can be approved by the writer.
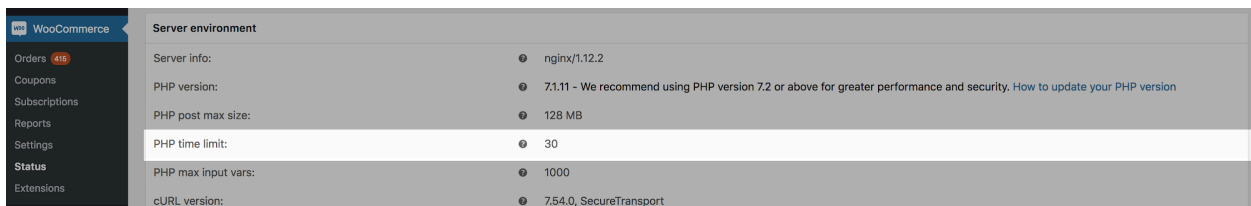
Style Guide

General

Screenshots

The idea with screenshots is to illustrate in a way besides words what you are talking about. Screenshots benefit from both context and specificity.

Context

If you were to look at a screenshot, would you be able to place it by sight? Would you know how to get to that place?
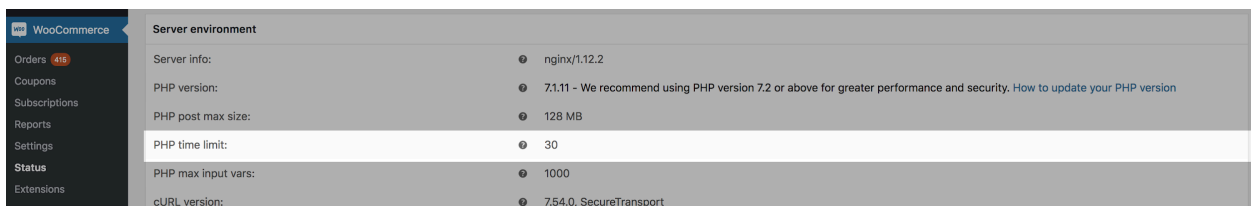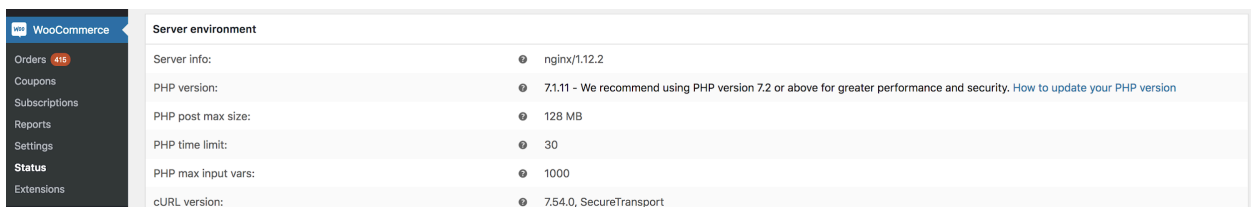This:

Not this:

Specificity

This is where highlight boxes, arrows, etc. come in. While context often means taking a bigger screenshot, adding these indicators points to what you are actually talking about.
This:

Not this:

Naming Conventions

Naming screenshots can be helpful when going to insert them into a doc.

Here's an example system:
Screenshot filename: "ER_1_settings.png"
- **ER** refers to doc subject/name, in this case, Early Renewal
- **1** refers to the order in the doc that this comes, this is the first screenshot
- **Settings** refers to a bit about what is on the screenshot, what it is illustrating. In this case it shows the settings page.

Sensitive Information

Sometimes screenshots can contain sensitive or private information. One way to address this is to use editing tools that blur or pixelate those areas. It is also possible to use the developer console in the browser to temporarily delete or change the text before taking the screenshot. When using screenshots of customer sites, be especially thorough in inspecting it to make sure there is no information that needs to be concealed.

Distracting Visuals

Sometimes a page where you are taking a screenshot will have something on it that might not be representative of what a user might see and could be distracting or misleading or is just not the ideal.

One example of this is the "Connect your store to WooCommerce" message at the top of the WordPress Dashboard on every page in the admin area. It's not an unrealistic visual to have in a screenshot, but takes away from the idea that the screenshot represents the ideal. It is often possible in this case to use the browser developer tools to hide or temporarily delete an element.

Another example might be having the site URL displayed. Your site might be a local installation or otherwise have what might be a confusing and non-representative URL showing on the page such as `site.localhost`. In cases like that, the developer tools can be used to temporarily replace the text on the screen.

Writing

Structure

- If it can be a list, make it a list. It is easier to skim a list than a paragraph. And on the web, people skim everything.
- Screenshots are often appropriate.
- It's better to use semantic markup, e.g. bold, italics etc., for emphasis rather than quotation marks
- Titles help break up the document to make it easier to read & skim, and also make it easier to link directly to specific parts of the doc.
- Keep an eye out for adding links. This provides clarification.

Word Choice

- Don't trade clarity for conciseness. Both is good, but if something is concise but confusing, elaborate to make it clearer.
- Words or phrases that change meaning depending if they have a space or not. Phrases/words like sign up/signup or log in/login or set up/setup. Generally the single word is a noun or adjective. Two words is a verb.
  - Ex: You can log in here. Look for the login button. This page has the login.
  - If there's a hyphen (sign-up) it functions the same as the single word (signup).
- Be consistent.
  - If you use one style of a word (such as signup), always use the same style for the whole document.
  - Redundancy. Sometimes, using the same word over and over can seem redundant in terms of writerly style. But in documentation, this can help the reader know that you are talking about the same thing as well as reinforcing certain vocabulary and concepts.
- Referring to other pages and links. Instead of using "here" or "this guide" as a link, use the title of the document you are linking to or something similarly descriptive.
  Instead of: More info about this can be found here.
  Try: More info can be found in the Guide to Other Information.