



HOW TO - FORMAT A GUIDE



COVER PAGE

The cover page should be all capital letters.

WHAT is in the How to Format a Guide?

This guide documents how to write documentation about tools, Processes and Practices (P&Ps) used or created at Hack for LA. Our guides are used to document and standardize Tools and P&Ps. Use this guide to create your guide so that future users will have a clear reference and examples on how to replicate your success.

Alternatives or things to know

For this guide, the audience is documenting processes and tools; if you are looking for a guide to documenting projects for external stakeholders, the Guide: [How to Write a One Sheet](#) may be more useful. The sections that are optional in the template (linked below) are marked “This section is optional”

What Is Tool?

Replace the word Tool in this section header with the name of the tool. And then add an overview of the tool

How To Format A Guide

Write the guide to document how the user should achieve the desired goal.

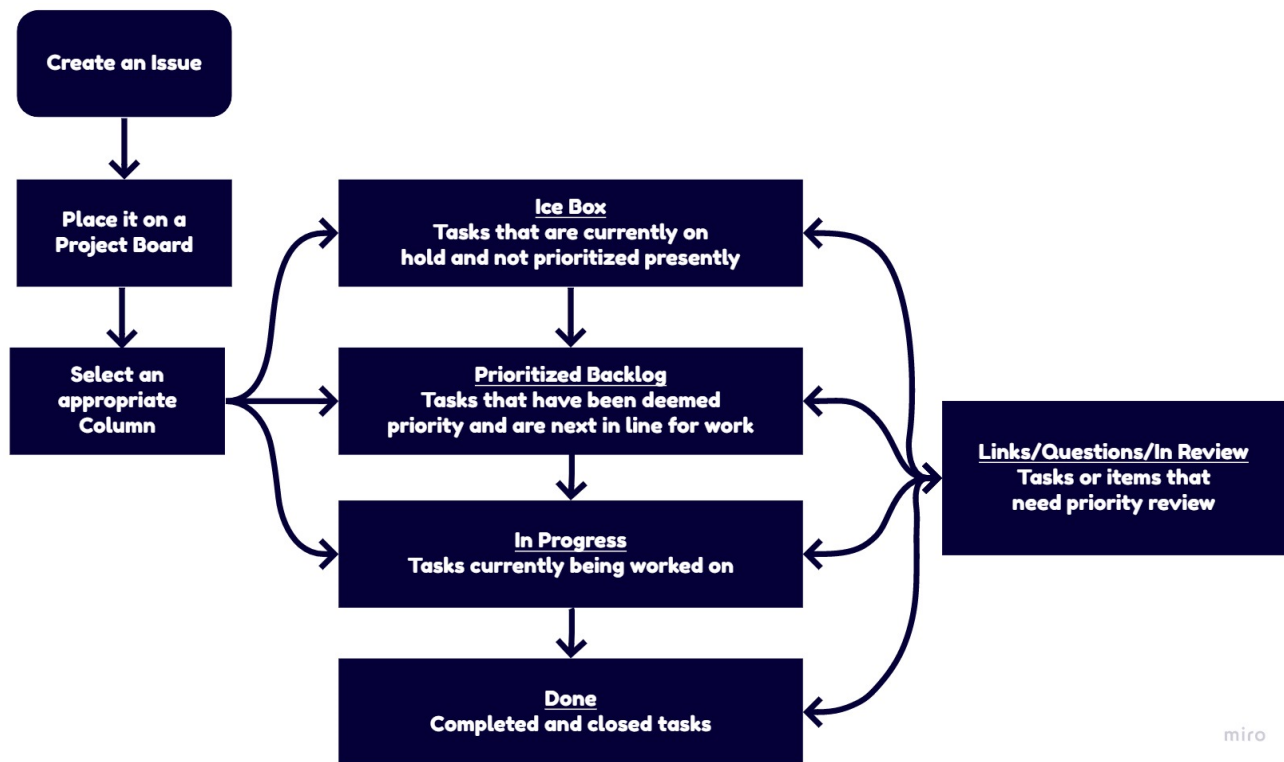
1. Guides should be clear overviews of the process.
2. Write with a clear idea of the user’s problem and goal in mind.
3. Aim to give users enough information to be able to move forward.
4. If there is detail that a user might need but is a fringe case, add an Additional Reference Material or Glossary section at the end to include the information.
5. Make a separate guide for any sub practices or processes and link to it from the relevant location in your guide if the guide is too long and/or parts of the guide would be useful by themselves.

How To Write About Processes

Process documentation should provide overviews of the process, detail how to implement the process and how to handle typical deviations.

Example:

Overview of the process a new issue takes to be useful to the team (outdated, since it's missing the New Issue Approval column)



How To Provide Step-By-Step Instructions

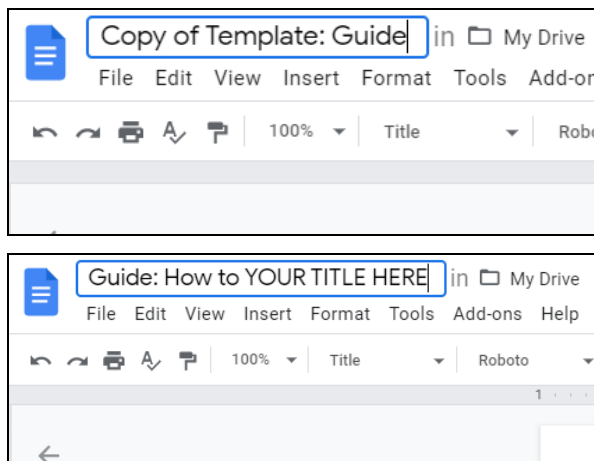
Document the steps to steps needed to accomplish a specific task. The steps should be clear and brief, since the user's goal will be to read them (often only once), do the task described, and continue with their work.

It may be helpful to approach this as a use case. Include visuals when possible, to make it easier for the user to understand the documentation.

Instructions For Using This Guide's Templates: Header & Guide

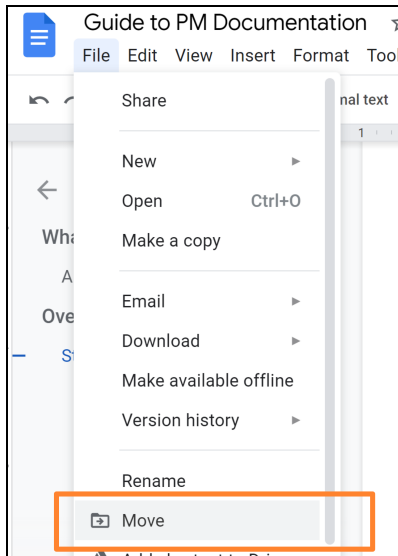
Creating And Storing Your Assets

1. Create a place to store the documentation you will be creating
 - a. Navigate to the [knowledgebase-content guides' folder](#)
 - b. Create a new folder for the guide, the title of the folder should read: ##### [DRAFT] [Insert NAME OF GUIDE] (e.g., 0144 [DRAFT] Interview Practice)
 - c. To create a shortcut to the specific CoP folder within "Practice Area Shortcuts":
 1. Identify the CoP folder the guide should be added to by checking the CoP label on the guide issue
 2. Right-click on the folder (that you just created in "[By Title](#)")
 3. Click Organize > Add Shortcut > All Locations > Shared Drives > Knowledgebase-content > Knowledgebase-content Folder > Practice Area Shortcuts
 4. Click 'Add' on the relevant folder
 5. Repeat for each practice area the guide is relevant to
 - d. Also create a shortcut to the folder "By Issue No."
 - i. Right-click on the folder (in "[By Title](#)")
 - ii. Click Organize > Add Shortcut > All Locations > Shared Drives > Knowledgebase-content > Knowledgebase-content Folder > Guides > By Issue No.
 - iii. Click 'Add' to "By Issue No." folder
 - e. Add a link to the folder into the Resources/Instructions section of the issue you are working from
 - f. Under the folder link, link the draft by typing the word Draft, followed by adding the title in brackets followed by the URL in parentheses (e.g., Draft [Guide: Add the "Quick link to bottom of page" to Issues](https://docs.google.com/document/d/16UMP2T8kwwg61BGL8HEnryc2NU_tIzJfPpagWUA5VwtY/edit?usp=drive_link))
2. Make a header by using this [template](#) and save it into the folder you have created
3. Use this [template](#) to start your guide
4. Name the guide the same as the folder you have created (minus the issue number)



5. Move the document into the folder you have created

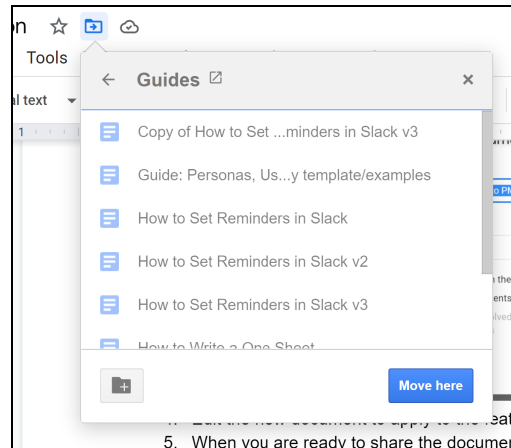
Choose File > Move



A menu will pop up with options. Click on the “>” to the right of Shared Drives

Select the Knowledgebase-content drive
[replace with image showing shared drives]

Select the Guides folder



Select the Folder you created before with the name of your guide

[INSERT SCREENSHOT]

And once inside it select Move here

[INSERT SCREENSHOT]

Editing Your New Guide

Use the Instructions and examples below to know how to fill out specific sections of the guide template

How To: [YOUR TITLE HERE- without brackets]

WHAT IS THIS GUIDE OR PROCESS?
Replace this sentence with your content, see specific instructions [here](#)

Alternatives or things to know?
Replace this sentence with your content, see specific instructions [here](#)

WHAT IS TOOL?
Replace this sentence with your content, see specific instructions [here](#)

HOW TO USE THE GUIDE OR PROCESS?
Replace this sentence with your content, see specific instructions [here](#)

INSTRUCTIONS FOR USING TEMPLATE: [Name of Template]
Replace this sentence with your content, see specific instructions [here](#)

I

Peer created guides are an important part of Hack for LA's Culture. Help us to make it better by posting any comments directly next to the content.

This guide was created and contributed to by: [ADD YOUR NAME AND THE NAMES OF ANYONE WHO HELPED MAKE THIS GUIDE, INCLUDING REVIEWERS, HERE- without brackets]

What is in the [Name of Guide]?

Please add an overview here. In a paragraph or so, explain (1) what the feature or goal is, and (2) how the user would use it. The goal is to summarize why someone would read this guide, so they can understand whether it meets their needs. The text that you will provide will be what people see under the link when they google it. It helps them decide if they want to click through because this guide is going to answer what they are looking for.

Example:

[insert example of an effectively written WHAT here]

Alternatives or things to know?

Is there anything that a reader should know up front? Are there other alternatives to the process you are describing, or any similar features? This section will not be necessary for all guides.

Example:

[insert example of an effectively written Alternative here]

What Is Tool Name?

Describe what the tool is and how Hack for LA uses it. Use this section if your guide uses tools, repeat if there are multiple tools. This section will not be necessary for all guides.

Example:

WHAT IS SLACK?

Slack is a communication and collaboration platform that organizes conversations into topics, groups or private messages. Each topic or group is called a Channel. Hack for LA uses slack to allow teams to connect, discuss and work on projects collectively. There are channels set up for both specific projects, and specific functional roles.

How To Use The Guide Or Process?

Explain to a user, with illustrations if possible, what the feature or goal is and how to use it. This should be detailed information for users to reference as needed.

Example:

Step 1: Check that you have access.

Ensure you have access to your project's Google Drive

- a. If you do not have access, ask the existing Product Manager to add you to it.
 - i. Make sure you are given access to the entire drive, not just specific documents
- b. If it does not yet exist, **ask the Admin team to create it** (you can write to them in the Hack for LA #admin slack channel).

Once added to the Drive, please add yourself to the team roster

- a. If it does not yet exist, create it using this [template](#).

Step 2: How to organize and label folders in the drive:

Organize the drive by numbering the folders and sorting all documents into the relevant folders and sub folders (See below). Note- all files and folders are for INTERNAL use only unless specified otherwise.

1. Get Started

- a. Copy of One sheet
- b. Copy of Team roster

Prerequisite For Using Guide

List any prereqs for using the guide. This section will not be necessary for all guides.

Example:

[insert example of an effectively written prereq here]

Instructions For Using Template: [Name Of Template]

If there is a template referenced from the guide please provide instructions for how to use it, so that the template does not contain the instructions directly. We have found that this keeps instructions from accidentally ending up in the final Guide.

Example:

[insert example of an effectively written TEMPLATE INSTRUCTIONS here]

FAQ

Troubleshooting When Trying To Execute The Steps

In this section you should answer who, when and how to reach out for help if the following happens:

- When the guide might be missing steps do you want them to reach out to the guide creator via the issue #, If yes, please use this text:
 - “From time to time a tool might change and this guide gets out of date. Or you might be reviewing a work in progress guide. If you find missing steps please post a comment on the [issue] for developing this guide.”
- Make sure to link the word issue in the text to your guide making issue
- When an option is grayed out or missing (lack of permissions)

Error messages & Warnings

Footer

After the sentence: “This guide was created and contributed to by” Please add your name and the names of anyone contributing to the guide followed by their LinkedIn URL linked to the LinkedIn icon.

Example:

See the bottom of this document as a typical example.

Formatting Text Including Section Headers & Steps

[insert instructions here]

Formatting Images In Your Guide

[insert instructions here]

How To Include Images In Your Guide

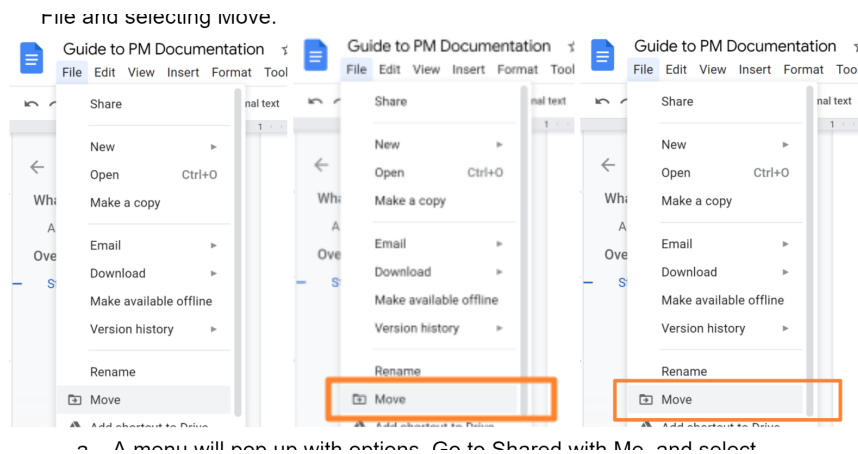
[Edit the How to Add Screenshots guide to include steps formatting]

Additional Reference Material:

Style Guide

1. Use this document as a starting point to easily copy the style and formatting.
2. Main headings should be in all caps, with the first word in bold.
3. The page heading (blue title banner) for pages 2+ can be created by:
 - a. Following our guide for [How to Add Screenshots and Graphics to your Guide](#).
 - b. Alternatively, it can be an embedded [image](#) used for this guide, which can be copied and updated for future guides (follow the Image Troubleshooting directions below in order to avoid a pixelated image)
4. Use header settings for the structure of the guide, to make it accessible to screen readers. Do not just change the font size.
5. For image format and annotations guidance, also follow our guide for [How to Add Screenshots and Graphics to your Guide](#). Add a **1px** line weight black outline around your images, and whenever possible we recommend adding a rectangle around the point of interest:
 - a. Use hex code **#FF832E** and **4px** line weight for the rectangle
6. Keep the guide as brief as possible while still communicating the necessary information.
 - a. Users may not read the full guide.
 - b. Use bullet points where possible; studies show that readers are more comfortable with short lines than long paragraphs, even if the information is the same.
7. Include illustrations wherever possible.

Illustration Troubleshooting



1. To embed the image, either use a photo editor or use Google Drawings.
2. If using Google Drawings, create each image as a Google Drawing.
 - a. Paste the screenshot or image into the Google Drawing
 - b. Crop the canvas to the size of the image
 - c. Embed the image into the Guide by Inserting the Drawing. If the image is fuzzy, go to Page Options in the Drawing and increase the canvas size (suggested 10x), then update the embedded drawing.
3. [This \(linked\)](#) is an example of Google Drawing image embedded in this guide.

Peer-created guides are an important part of Hack for LA's Culture. Help us to make it better by posting any comments directly next to the content.

This guide was created and contributed to by:

Rose Crowell 

Erika Gil 

Katie Jensen 

Bonnie Wolfe  

France Chan 