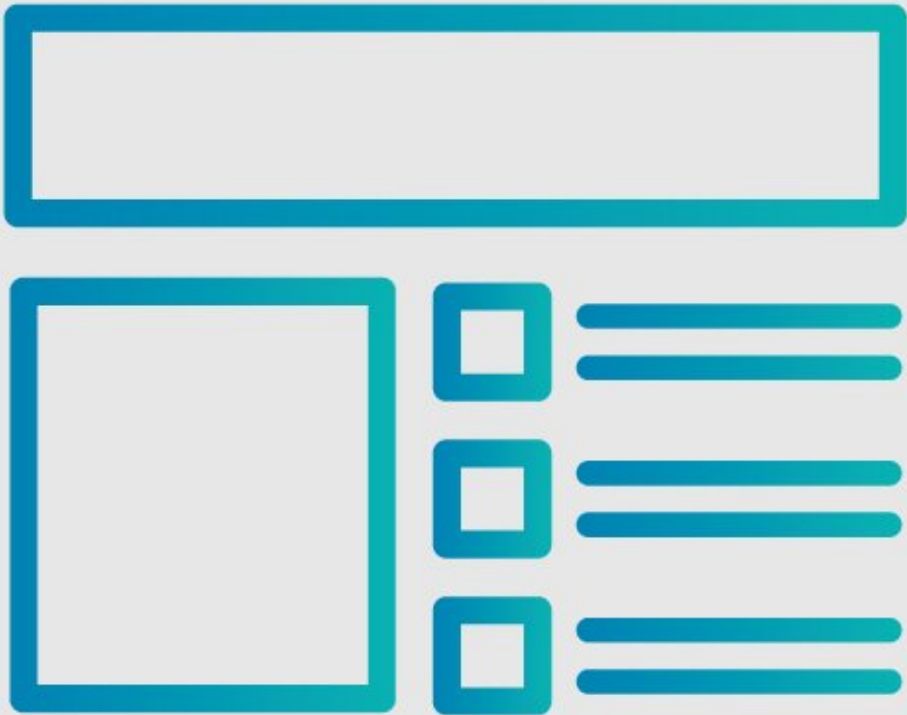




How to Create a Guide

This guide demonstrates how to create a guide page.

Written By: Dozuki System



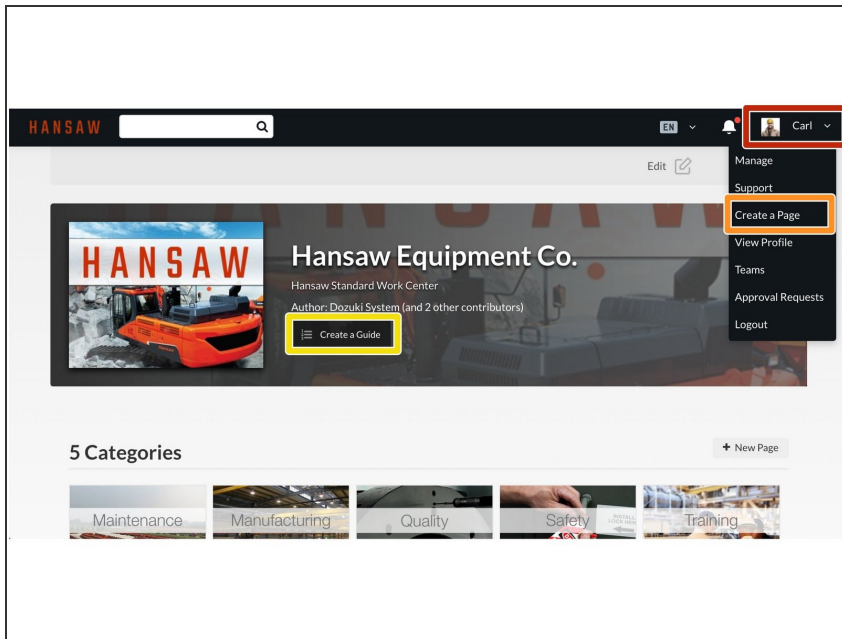
INTRODUCTION

This guide demonstrates how to create a guide page.

Reminder

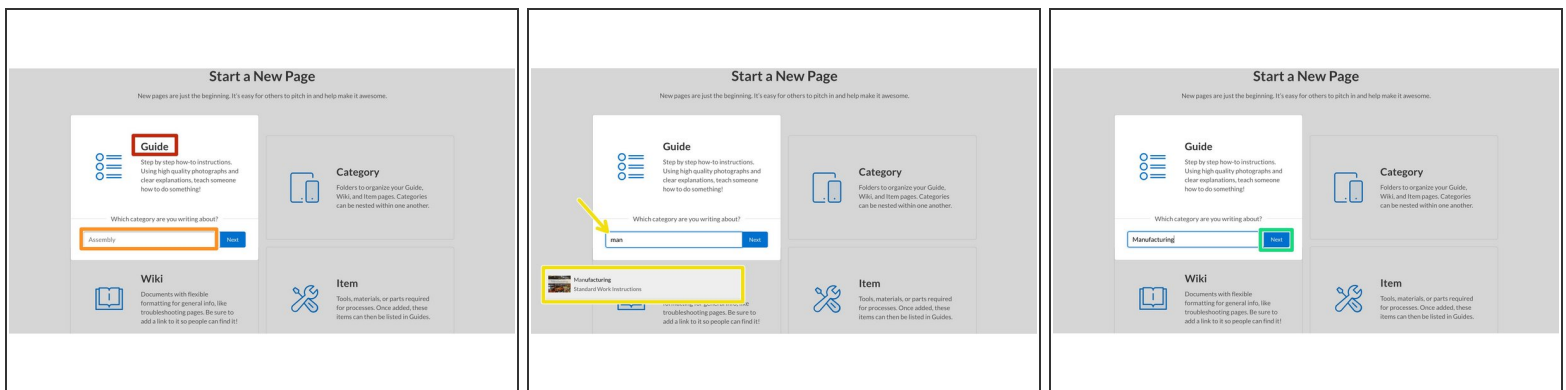
Any changes made to a guide, with the exception of tags and the default language, create a new draft of the guide.

Step 1 — Open the User Menu



- Click on your **username** on the right side of the site header.
- Select **Create a Page** from the drop-down menu.
- If you are already on the category page for the new guide, click on the **Create a Guide** button in the upper-center of the page.

Step 2 — Start a New Guide Page



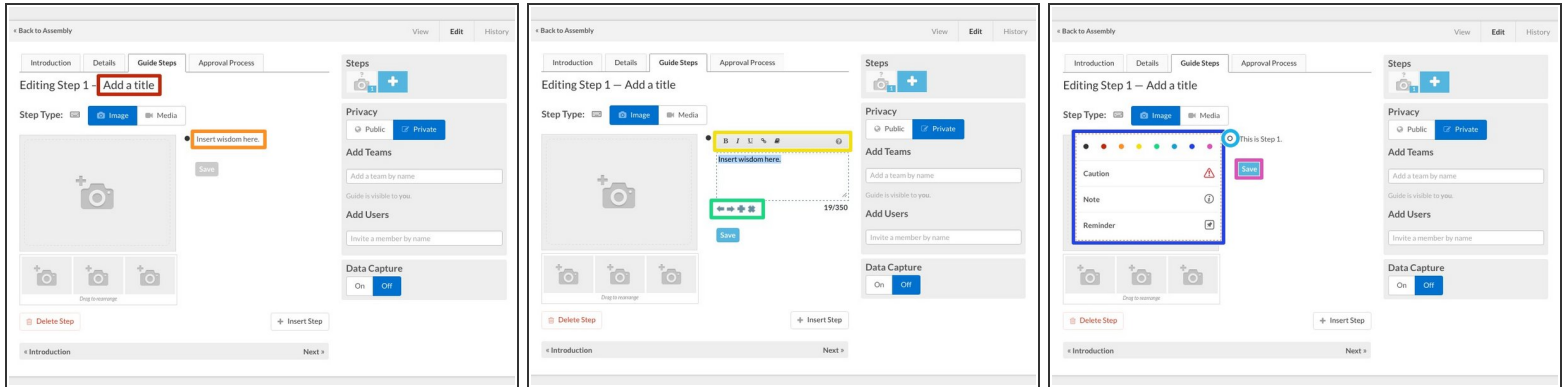
- Click on the **Guide** icon in the **Start a New Page** options.
- To organize your guide, enter the name of the guide's designated **category**.
- As you type, if the category already exists, it will appear in a drop-down list below the text box. Select your **category** from the list.
 - ❗ If the category does **not** already exist, a **new** category page will be created.
- Click on the **Next** button.

Step 3 — Add Introduction Content

The screenshot shows the 'Create a New Guide' interface. The 'Introduction' tab is selected. The 'Guide Title' field is highlighted with a red box and contains the text 'Department Functions'. The 'Search Summary' field is highlighted with an orange box and contains the text 'Summarize in a sentence or two what this guide will accomplish'. A 'Show More' button is located below the 'Search Summary' field. A 'Save' button is located at the bottom right of the form. A sidebar on the right titled 'Create a New Guide' provides key points and a link to the 'Technical Writing Handbook'. The status bar at the bottom indicates 'Creating Introduction'.

- Enter a title for your new guide in the **Guide Title** field.
- Add a summary in the **Search Summary** field to briefly explain what the guide will demonstrate.
- If you want to add other information at this time, such as an introduction or flags, click **Show More**.
- ☑ Review the [Parts of a Guide Page](#) to better understand the various elements that make up a guide.
- When finished adding information, click on the **Save** button.

Step 4 — Create a Step



- Click on the **Add a Title** text to enter a title for your first step.
- Click on the **Insert wisdom here** text to enter your first bullet point text instructions.
 - This is the placeholder text by default; it can be removed or customized in the Management Console under **Configuration > General > Guides > "Customize Default Step Title/Step Text"**
- Use the **formatting toolbar** at the top of the text editing box to format your text or [add links](#).
- Use the **arrows** below the text box to indent your bullet. Use the **+** icon to create a new bullet and the **X** icon to delete the bullet.
- To change the color or icon for the bullet, click on the bullet icon.
- Select from the color/icon menu to change your bullet point.
- Click on the **Save** button to create your first step!

Step 5 — Customize Step Content

B I U ↻ ?

(RED Grab the appropriate box for the item. RED)

← → + ×

48/350

i

Note: The box should fit the item you are shipping while leaving room for packaging material.

Save

Grab the appropriate box for the item.

i

Note: The box should fit the item you are shipping while leaving room for packaging material.

Save

- i

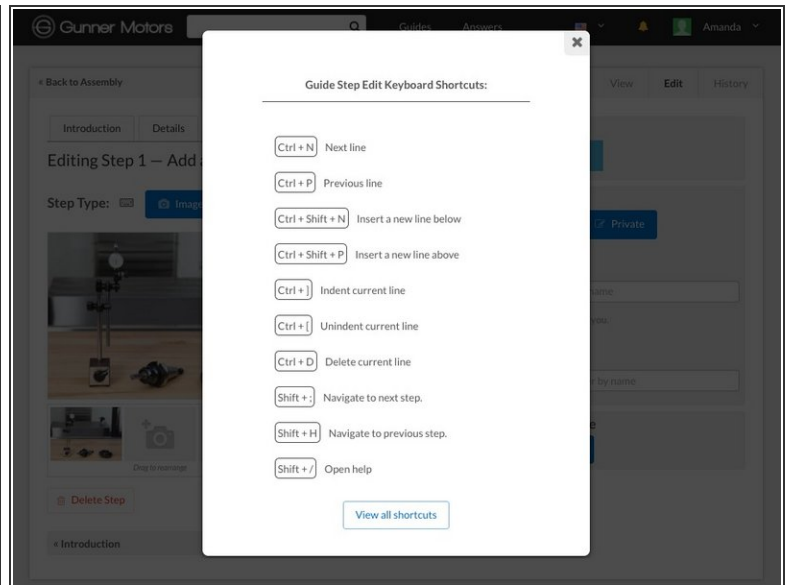
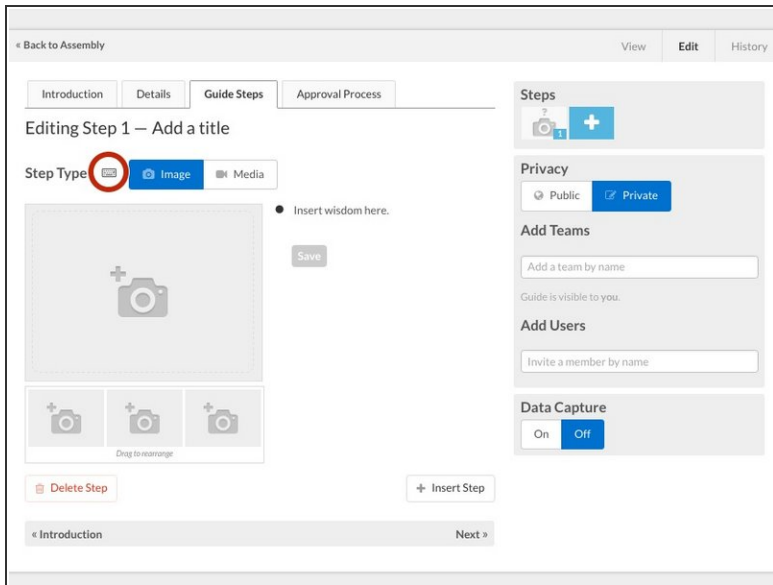
 In addition to Dozuki's standard bullets, you can also create and use your own [Custom Bullets](#).
- You can also customize the color of text within a step, by typing (COLOR text COLOR), as shown in the example with red text.
- i

 Dozuki supports RED, BLUE, GREEN, YELLOW, ORANGE, TEAL, PURPLE, PINK, and (we recommend you exercise caution with white text on a white background).
- i

Bold, underline, and *italics* all function as normal within the color bracketing.
- ⚠

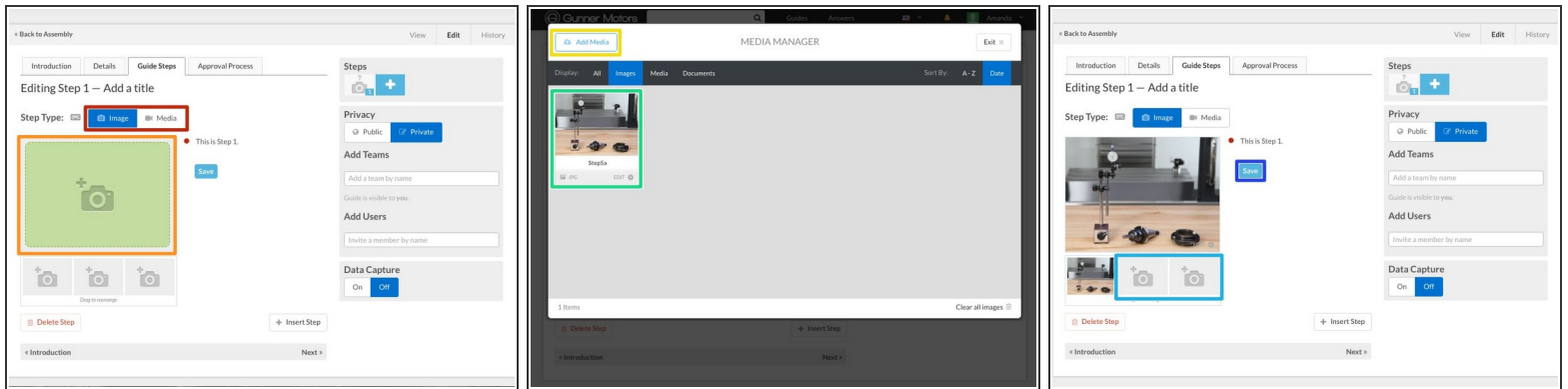
 Caution bullets default to red text without color brackets but this can be overridden

Step 6 — Keyboard Shortcuts



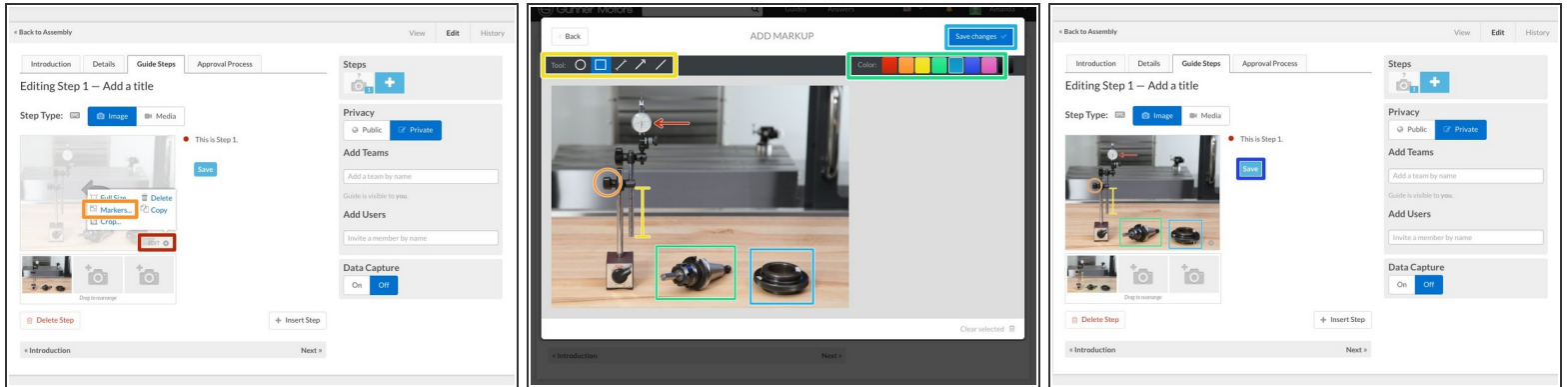
- To open a Keyboard Shortcuts pop-up window, click on the keyboard icon in the upper-left of the page.
- ① Use these (and others listed in the KeyBoard Shortcuts window) to quickly navigate while creating guide steps:
 - **Return:** Next bullet or insert new bullet.
 - **Shift + Return:** Previous Bullet or Insert Bullet Above.
 - **Ctrl +]:** Indent bullet.
 - **Ctrl + [:** Unindent bullet.
 - **Ctrl + D:** Delete bullet.

Step 7 — Add Step Visuals



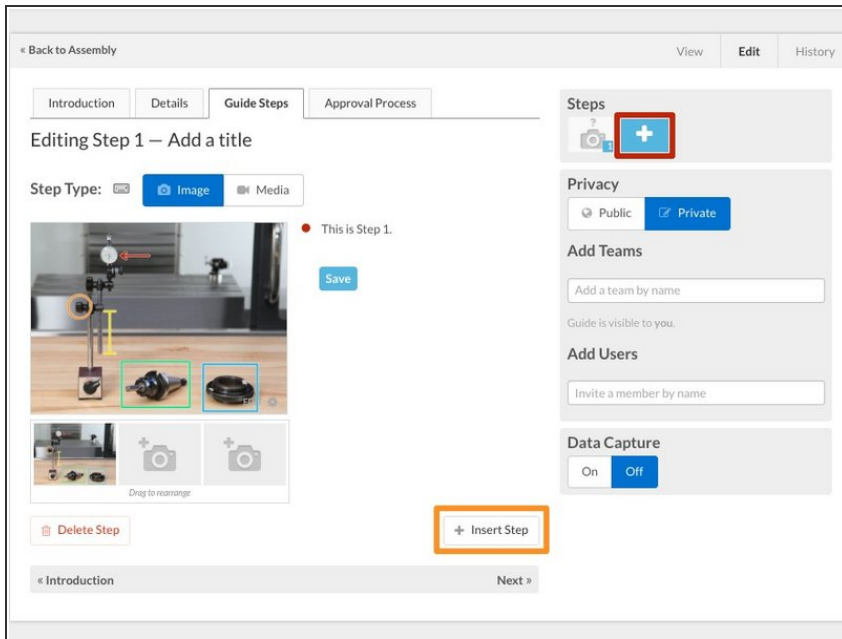
- To add enhancing images or media, select either **Image** or **Media**. Both are located below the step title.
 - ⚠ You can add up to three images per step, while video and other media is limited to one file per step.
- Click the image or media **placeholder** to open the Media Manager.
- Click on the **Add Media** button to add a new image or video to your library.
 - ① Review the [Media Manager Help Page](#) for more information about using media.
- To add media to your guide step, click the image or media file in your library.
- If you are using images, you can use the **two remaining image placeholders** to add up to three images to your step.
- Click on the **Save** button to save your visual guide step.

Step 8 — Add Image Markup



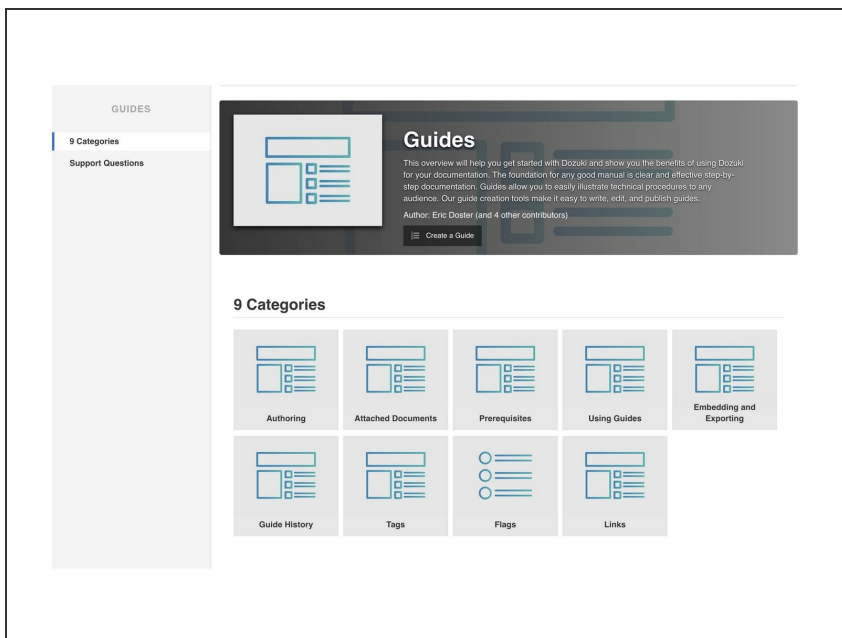
- ✦ Markup **cannot** be added to videos or other media.
- Move your cursor over your new guide step image, then click on the **Edit** button in the bottom-right corner.
- To open the Markup Window, select the **Markers** option from the menu.
- Use the **Tool** menu in the top-left of the Markup Window to select a shape, line, or arrow marker.
- Click the image where you want to place the marker and adjust the size, shape, and orientation as needed.
- Use the **Color** menu in the top-right of the Markup Window to select a color for your new marker.
- Once you have created all of the markers, click on the **Save Changes** button in the very top-right corner of the Markup Window.
- View your new image with the markup and click on the **Save** button to save it to your guide step.

Step 9 — Add More Steps



- To add a new step, click the **+** icon in the top-right corner (Step section) of the page.
- *This option will add a new step to the end of the guide.*
- You can also use the **+ Insert Step** button to add a new step *immediately after* the step you are currently editing, rather than at the end of the guide.

Step 10 — Guide Details and Settings



- Review the [Parts of a Guide Page](#) to add further detail to your guide.
- Use the [Help Guides](#) to review specific topics, including:
 - [Prerequisite Guides](#)
 - [Data Capture](#)
 - [Guide Privacy Settings & User Access Controls](#)
 - [Publishing](#)