

The CD Browser—A New Documentation Vehicle

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ABSTRACT

A CD Browser is a user-friendly front-end to a software CD ROM. This demonstration shows how CD Browsers can be used to meet documentation goals.

Keywords

CD Browser, multimedia, online documentation, installation instructions.

1. WHAT IS A CD BROWSER?

When you install software from a CD ROM, you are often presented with a menu of choices for what to install. As software packaging has become more sophisticated, this *Installation Menu* has evolved, in many cases, into a user-friendly front-end program called a *CD Browser*.

In addition to launching installation programs and enabling easy browsing of the CD contents, CD Browsers are typically used for marketing purposes—such as providing corporate profiles, cross-selling information on related products, and company contact information.

2. A VEHICLE FOR DOCUMENTATION

A CD Browser can also be an effective vehicle for delivering documentation, in at least three ways:

1. By delivering online documentation before the software products are installed.
2. By building documentation into the installation process.
3. By launching quick tours or in-depth tutorials.

2.1 Delivering Documentation Before Installation

This is perhaps the most obvious documentation use of a CD Browser. As the software industry has migrated to a standard of delivering most documentation online, the requirement of getting needed documentation into customers' hands before installation of the software has often become an issue. Installation or implementation manuals may still be provided in printed versions, which are costly to develop, maintain, and deliver. Or documentation files may be delivered on the product CD

ROM, but it may not be obvious to the users that they are there.

A CD Browser can address this issue by delivering the software and the documentation files in an integrated package. Documents in HTML, Windows Help, or Adobe Acrobat format can all be provided electronically and launched from the same menu. Customers inserting a product CD ROM can be presented with the option of seeing online documentation before they install any software.

2.2 Building Documentation into the Installation Process

A related benefit is the ability to build certain documentation into the installation process. Software that operates in a complex or networked environment usually requires intricate setup procedures. Even simple products may have obscure prerequisites. Yet customers often expect a "plug and play" installation process and are seldom in the habit of reading documentation before trying to install their software.

While it is always best to automate software installation as much as possible—making the computer do the work—it is seldom possible to remove all requirements for human input. A CD Browser can be an effective tool for bridging this gap. By integrating complex instructions or prerequisites into the installation process, it can require the user to view setup documentation and make the necessary decisions, before actually installing. (See Figure 3 for an example.)

2.3 Launching Quick Tours and Tutorials

Finally, a CD Browser can provide a means of launching multimedia presentations associated with the software. Quick tours can introduce the main features of a product, either for preliminary instruction or for cross-selling. In-depth tutorials can be provided to teach software operations without having to actually install a whole system.

To fulfill these purposes, the CD Browser can leverage existing multimedia assets. For example, segments of a product demo CD or a CBT module can be borrowed and perhaps modified to create a quick tour accessed from the browser.

3. AN EXAMPLE CD BROWSER PROJECT

In early 1999, I was involved in developing a CD Browser for a software company. For several reasons, the company was reevaluating their product packaging.

- Accelerating release cycles were causing printed documentation to often become outdated. The company therefore wanted to stop shipping printed manuals entirely and deliver all of the documentation online.
- Many customers were confused by the installation process and were not able to set up the software without help from Technical Support. While the documentation addressed many of the setup issues, most customers did not read the manuals and were unaware that the manuals were already delivered on the CD.
- The company president wanted a more professional look and feel to the product CD and the opportunity to cross-sell products.

A CD Browser was decided on as part of the new product packaging because it was believed this could address both the documentation and the marketing objectives.

Figure 1 shows the main menu of the completed CD Browser. Mouse rollover text at the bottom of the screen explains each menu option. In addition to links to the Installation menu and company contact information, there are options for a separate Documentation menu, for a menu of quick tours, and for browsing the CD to view or copy sample graphics files that are delivered with the products.



Figure 1: Main Menu

Figure 2 illustrates the Documentation menu. Since the information set includes both Adobe Acrobat and Windows Help files, these two groups are arranged as subheadings. Users have the option of either installing any of the online documents or of viewing them directly from the CD. There are also options for installing the Adobe Acrobat Reader and for viewing a text readme file.

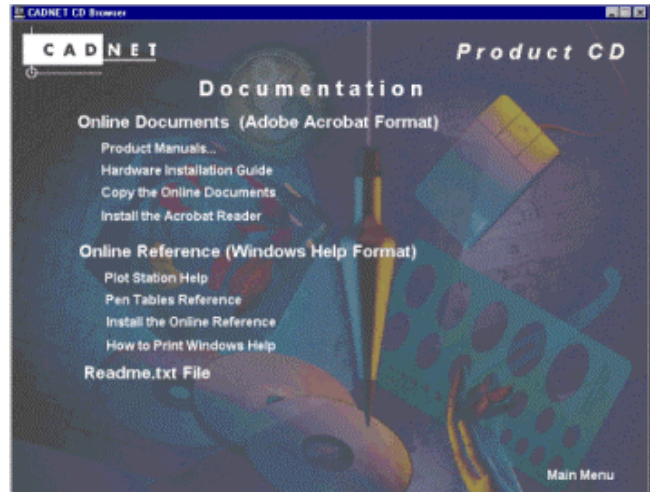


Figure 2: Documentation Menu

When users click any of the products listed on the Installation menu (not shown), they are presented with a page of setup prerequisites (Figure 3). Organized as a checklist, this page spells out all of the information the user must have to successfully install the product. Buttons at the bottom of the checklist provide links to the complete documentation on the subject, to installing the Acrobat Reader if needed, and to actually launching the installation program.

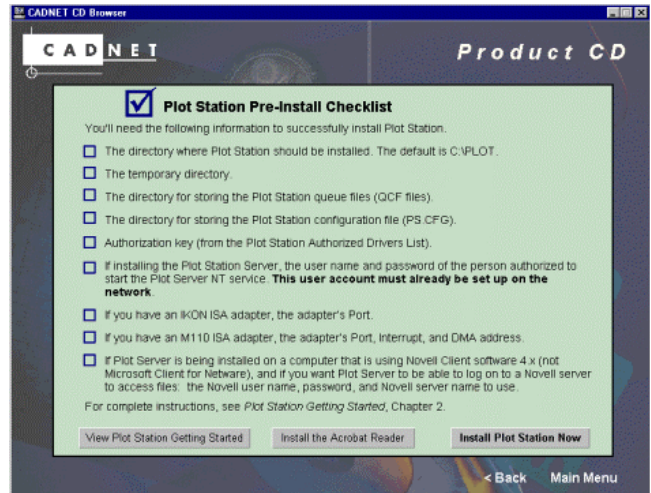


Figure 3: Pre-Installation Checklist

As mentioned above, a CD Browser can easily launch other multimedia objects such as quick tours or tutorials. For this project, one of the goals was to include cross-selling information on the CD. For this purpose, pieces of the company's existing Product Demo CD were adapted. The Quick Tours menu (not shown) provides a means of launching these various presentations, which illustrate the main features and benefits of the products. Figure 4 shows a sample screen from one of the quick tours.

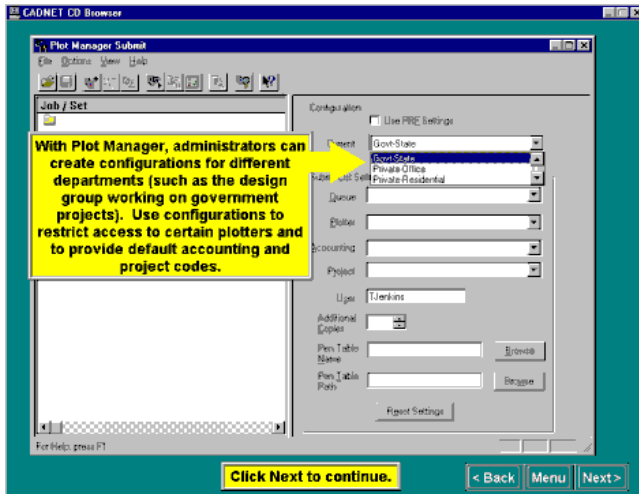


Figure 4: Quick Tour Sample Screen

4. TOOLS AND DEVELOPMENT PROCESS

A CD Browser is a relatively simple multimedia program and can be developed using a programming language or an authoring tool. Any authoring tool capable of launching external programs (specifically, the product installation programs) can be used. Some leading tools in this arena are Asymetrix Toolbook, Macromedia Director, and InstallShield's DemoShield.

As with any multimedia project, certain development procedures and milestones are to be recommended.

1. Create a detailed outline with storyboard illustrations and indications of program flow. Use this "paper prototype" for initial review and signoff purposes.
2. If possible, create a preliminary working prototype to allow a second review cycle. Include usability testing at this stage, as rigorously as possible.
3. After development, make sure there is QA testing of the CD Browser. This testing must verify that all menu links work correctly and that the Browser validly launches all of the installation programs on the CD. The QA phase should also include some usability testing, especially if this has not been done earlier.

5. CONCLUSION

Software release cycles continue to accelerate and product packaging methods continue to change. Meantime, customers' demands for easy-to-use software increase, as does their impatience with hard-to-understand products. In this climate, documentation professionals are challenged to find new and better ways to deliver usable information to our customers.

A CD Browser is one effective vehicle for doing this—especially for delivering online documentation and for making installation and setup instructions very obvious and clear. A CD Browser is also a challenging and fun product to create.

6. ACKNOWLEDGMENTS

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