

Documentation Plan: A World-Builder's Guide to PBworks

Product Overview

PBworks is an online collaboration platform that provides a flexible, wiki-style environment for managing and organizing information. The web-based workspaces provide an intuitive space for organizing and building detailed world-building notes for timelines, character profiles, settings, important items, and even plots, making PBworks a convenient central hub for creating, organizing, and referencing world-building materials.

Audience Description

This guide is geared for creative writers - including novelists, screenwriters, playwrights, and game designers - who want to document, organize, and manage their world-building materials. These users prioritize ease of use to reduce wasted time shuffling through traditional, clunky word documents or notebooks. With quick and easy navigation, they can get back to writing sooner. Users will appreciate the option for customizability to visually differentiate and brand their wikis. These writers are likely to make use of the adjustable privacy settings - on the wiki as a whole or on individual pages - to better collaborate or share with potential co-writers and editors.

User Guide Outline

1. H1 - Getting Started

Introduces users to the interface, terms, available features, and how to get set up with their first wiki.

- **H2 - Introduction to PBworks** (Concept)
Explains the purpose and benefits of PBworks for managing creative projects and organizing world-building notes.
- **H2 - Key Concepts and Terminology** (Concept)
Introduces terms including "Workspace," "Pages," "Folders," and "Tags" to help users navigate PBworks effectively.
- **H2 - User Interface Overview** (Concept)
Explains the interface, including the dashboard, navigation bar, editing toolbar, and

search bar.

Screenshot: Dashboard

Screenshot: Wiki FrontPage tab

- H3 - Exploring the Files Manager
 - H3 - Assigning Tasks
 - H3 - Monitoring Activity
 - H3 - Adding/Editing Members and Roles
 - H3 - Editing Settings and Preferences
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- **H2 - Creating an Account and Logging In** (Task)
Instructs users on signing up, and how to log in once they have an account.
 - H3 - How to Create an Account
Screenshot: "Get Started" Pop-up from main screen
Screenshot: Sign up screen
 - H3 - Logging In
Screenshot: Main tab
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- **H2 - Create a Wiki** (Task)
Shows users how to create a new wiki.
Screenshot: "Add a Wiki" pop-up
Screenshot: "Top menu > +" drop-down menu

2. H1 - Setting Up Your Wiki

Guides users through creating a workspace, customizing it for their projects, and adjusting privacy settings.

- **H2 - Edit Details and Description** (Task)
Shows users where to modify wiki details.
Screenshot: "Settings > Info"

- **H2 - Customize Branding** (Task)
Teaches users how to upload a logo and banner.
Screenshot: "Settings > Branding"

- **H2 - Personalize Theme** (Task)
Shows users how to customize theme colours.
Screenshot: "Settings > Themes"

- **H2 - Adjust Privacy Settings** (Task)
Explains how to manage security settings and account privacy.
Screenshot: Settings > Security

- H3 - Customized Page Security (Task)
Screenshot: "Page > ⚙ > Security"
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3. H1 - Creating and Editing Pages

This section of the guide will teach users how to set up and organize their pages.

- **H2 - Get Started with Pages** (Task)
Shows users how to add, duplicate, and edit a page.
Screenshot: Page layout with toolbar and sidebar visible
 - H3 - How to Add a New Page (Task)
Screenshot: Page with top bar visible
Screenshot: Files tab
 - H3 - Editing and Saving Pages (Task)
Screenshot: Edit Page with toolbar and sidebar visible
 - H3 - Duplicating Pages (Task)
Screenshot: "Page > ⚙ > Copy"
- **H2 - Tags** (Concept)
Describes how to assign and use tags to further categorize pages for an interconnected reference system.
 - H3 - Assigning Tags (Task)
Screenshot: Tags pop-up
- **H2 - Adding Media to Pages** (Task)
Shows users how to add lines, graphics, and videos.
 - H3 - Inserting Horizontal Lines
Screenshot: Edit Page and "Insert > Horizontal Line"
 - H3 - Adding Graphics from Files
Screenshot: Edit Page with "Insert links > Images and files" sidebar selected
 - H3 - Adding graphics from URL
Screenshot: Edit Page with "Insert links > Images and files" sidebar to show "Insert image from URL" link
 - H3 - Embedding video
Screenshot: Edit Page with "Insert > Video" menu open
- **H2 - Adding Hyperlinks for Easy Navigation** (Task)
Teaches users how to include hyperlinks within page contents using manual input, drop-down, and from the automatic sidebar-generated link.
Screenshot: Edit Page with "Add Link" pop-up

- **H2 - Using Plugins for Enhanced Navigation** (Task)
Explains how to create and use plugins to create menus to anchor links within a page, and how to create menus for folders.
 - H3 - Insert Table of Contents with Anchor Links
Screenshot: Edit Page with "Insert > Table of Contents" menu open
Screenshot: Table of Contents Pop-up
 - H3 - Insert Folders & Folder Contents as Menus
Screenshot: Edit Page with "Insert > More Plugins > Page Information > Folder Contents" open
Screenshot: Folder Contents Pop-up
 - **H2 - View History and Restore Past Revisions** (Task)
Explains where to view revision history for a page.
 - H3 - View Revisions (Task)
Screenshot: "Page > ⚙ > History"
Screenshot: History page
 - H3 - Compare Revisions (Task)
Screenshot: Compare History page
 - H3 - Remove Revisions.(Task)
Screenshot: History page showing Remove revisions option
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4. H1 - Structuring Your Workspace

Teaches users how to make the most out of the organizational features for optimal referencing.

- **H2 - Organizing Your Workspace** (Concept)
Describes strategies for structuring folders, pages, and tags for effective world-building.
Screenshot: Files tab
 - **H2 - Creating Folders to Organize Pages** (Task)
Guides users in how to set up folders for characters, settings, timelines, and plotlines.
 - H3 - Creating Folders from Page View
Screenshot: Page with "+" drop-down menu open
 - H3 - Adding Folders in Files Manager
Screenshot: Files tab
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5. H1 - Navigating Your Workspace

Explains the various ways to quickly search and navigate through content to find exactly what they're looking for in just a few clicks.

- **H2 - Search Bar** (Concept)
Describes convenience of search bar, and how search results are organized.

Screenshot: Search results

- **H2 - Using Navigator** (Task)
Explains to users how to use folders to quickly browse pages.
 - **H2 - Starred Pages and Files** (Task)
Shows users how to keep important content as convenient as possible.
Screenshot: Page title showing star
Screenshot: Navigator showing starred content selector
 - **H2 - Quick-view Menu** (Concept)
Explains the shortcut for users to access the most commonly needed features.
 - H3 - Recent Items
Quickly view/access recently added/edited pages.
Screenshot:  drop-down
 - H3 - Starred Items
Screenshot: Starred Items drop-down
 - H3 - Tasks
Screenshot: Tasks drop-down
 - H3 - New
Screenshot: + drop-down
 - H3 - User Menu
Screenshot: User drop-down
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6. H1 - Sharing and Collaboration

Shows users where and how to invite other users for collaboration, as well as how to set security and permissions for other users.

- **H2 - Invite Members** (Task)
Shows users how to invite collaborators and editors.
Screenshot: Members tab with "+" open
- **H2 - Edit Member Permissions** (Task)
Explains how to manage member permissions, including view-only, editor, or moderator options.
Screenshot: Members tab with Permissions drop-down open
- **H2 - Tracking Global Changes and Version History** (Concept)
Explains how and where to review edits, track changes, and restore previous versions of pages.
 - H3 - Tracking Activity (Concept)
Screenshot: Activity

- H3 - View Changes (Concept)
Screenshot: “Activity > Show Changes”
 - H3 - Comparing Past Versions (Concept)
Screenshot: “Activity > Show Changes > Back to Revisions List”
 - H3 - Remove Revisions (Task)
Screenshot: “Activity > Show Changes > Back to Revisions List (Showing Red Xes) > Delete this Revision” menu
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7. H1 - Exporting Your Wiki

Explains how to back up wiki files as local copies on their computers.

- **H2 - Pages to PDF** (Task)
Describes to users how to view and download individual pages as PDFs (plugins only appear as shortcode)..
Screenshot: “Page > ✨”
 - **H2 - Export Files and Folders** (Task)
Explains how to export the wiki or parts of the wiki as a zip file where pages are .html files.
Screenshot: “Settings > Export ZIP”
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