

Making Help Helpful

Tips for Effective Documentation

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What I Will Cover Today

The bare minimum you need to know to produce an effective help document, including:

- ▶ How to analyze your audience.
- ▶ How to decide what to write.
- ▶ How to make your documents readable.

This Talk Will Not...

- ▶ ...teach you to be a professional technical writer, usability specialist or information designer.
- ▶ ...cover grammar, punctuation, or style rules (e.g., “Web site” vs. “website”).
- ▶ ...tell you how to write every type of technical document.

Who Reads Help Docs, and When?

People use documentation for three primary reasons:

1. To get started (e.g., installation and configuration instructions).
2. To get answers they can't learn through experimentation, such as known issues and looking up error messages.
3. To seek help with applying skills to new activities and projects.

Thinking About The User

- ▶ Users do not want to RTFM, so make the experience as painless as possible.
 - ▶ Chances are, they're already annoyed they have to consult the documentation.
 - ▶ They need help! Now!
- ▶ You may or may not have their undivided attention. Even if you do, you will lose it quickly if your document is a mess.
- ▶ Before you start writing, do a quick analysis of your audience.

Rule #1: Know Thy Audience

- ▶ Are they...
 - ▶ Experts?
 - ▶ Technicians?
 - ▶ Executives/Management?
 - ▶ Non-specialists/non-technical?
- ▶ What is their background knowledge, experience, and training?
 - ▶ **Examples:** Heavy programming experience vs. light to no scripting experience
 - ▶ Comfortable with command line interface vs. GUI
 - ▶ Student (undergrad or grad) vs. working professional

Writing for Mixed Audiences

- ▶ It's common to have at least two audiences.
 - ▶ **Primary:** The largest percentage of your users who will be reading your document.
 - ▶ **Secondary:** The second-largest group of users who will be reading your document.
- ▶ If the proportion of your primary and secondary audiences is very skewed, such as 90/10 or 80/20, write for the majority.

Writing For Mixed Audiences: Possible Approaches

- I. Include an “Expected User Knowledge” section to describe the baseline skills users should have.
(In other words, system requirements for humans.)
 - ▶ **Example:** To use MonkeyWrench Pro effectively, you should be comfortable performing the following tasks:
 - Install software from disk or .zip file
 - Browse your computer's file directory structure
 - Save and delete files on your computer's hard drive

Writing For Mixed Audiences: Possible Approaches

2. Write separate sections for each audience, and use headings and section intros to identify which sections apply to which audience.

▶ **Examples:**

New to MonkeyWrench Pro? Start Here!

Intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text. Intro text intro text intro text intro text intro text intro text.

Intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text. Intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text.

Changes Since The Previous Version (Experienced Users)

Intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text. Intro text intro text intro text intro text intro text intro text intro text intro text intro text intro text.

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Convey Information, Not Personality

- ▶ Good documentation communicates vital information, accurately.
- ▶ It's okay to adopt a casual writing style and tone, but refrain from using excessive humor, sarcasm, or personal stories.
- ▶ Use plain language. Avoid marketing-speak – you are teaching, not selling.

What To Write In A Help Document

1. **Start with an introduction containing:**
 - ▶ Description of the software or product.
 - ▶ Who should use the software, and when.
 - ▶ Expected user knowledge and system requirements.
2. **Provide instructions for the 5-7 most common user tasks, such as:**
 - ▶ Installation and configuration
 - ▶ Creating or initiating a new job, file, or other commodity task performed by the software
 - ▶ Saving jobs, files, etc.
 - ▶ Editing and deleting existing jobs, files, etc.
 - ▶ Publishing or sharing the new job, file, etc.

What To Write In A Help Document

3. Include troubleshooting tips for expected issues.
 - ▶ Known issues and suggested workarounds.
 - ▶ Error messages and suggested resolutions.

4. Tell users where to get more help, such as:
 - ▶ Helpdesk phone number, email address, or URL to a Web form
 - ▶ User group or user support forum
 - ▶ Online knowledgebase, such as a wiki

What To Write In A Help Document

- ▶ Consider including a special section for “power users” (i.e., programmers) that may include:
 - ▶ Instructions for extending the code to add new functionality.
 - ▶ Details on how program elements interact, and dependencies between elements.
 - ▶ Where in the source code an action or series of actions occurs.

What **Not** To Write

- ▶ A long list of in-depth descriptions of each feature.
 - ▶ Converting system specs into a user manual is lazy and ineffective.
- ▶ Which programming language you used.
 - ▶ Exception: You expect users to extend or enhance your program.
- ▶ “Engineer-ese” (Remember: plain language!)

Readability 101

- ▶ To make a document readable, organize the information to make it easy to digest. Methods include:
 - ▶ “Chunking” information into manageable, related units
 - ▶ Writing descriptive headings and subheadings
 - ▶ Using tables, bulleted and numbered lists, and graphics.
- ▶ Big, dense paragraphs are *intimidating*.
- ▶ Users **scan, skip, and retrieve** information that is most pertinent to them at that moment.

Example: Making Bagels

- ▶ If you want to thaw frozen bagels in 1 ½ -2 hours, where do you put them?

HOW TO MAKE BAGELS

Before baking the bagels, you must first thaw them, then top them with onions, garlic, or poppy seeds. Instructions are provided below.

To thaw and top the bagels:

1. Dry the stainless steel thawing trays (dry trays prevent sticking), then place about 20 bagels on each tray. Bagels expand when thawing, so make sure to space them at least five inches apart so that they don't touch when they expand.
2. It's important to plan baking times carefully so that the bagels do not remain on the racks for more than four hours after thawing. Bagels that are left on the racks for more than four hours must be discarded. After placing the bagels on the thawing trays, place the trays on every other self of the rack and do not close the covers. This will thaw the bagels in 1½ to 2 hours. To thaw them in 4 hours, place the trays on every shelf of the rack, then close the covers. To thaw them between 4 and 24 hours, place them on every shelf of the rack, close the covers, and place them in the refrigerator. After thawing, insert a fork into two or three bagels on each rack to make sure they are completely thawed. If the bagel is thawed, the fork should have moist dough on it when you remove it from the bagel. If the bagels are not thawed completely, continue thawing, checking them every 15 minutes with the fork.
3. After the bagels are completely thawed, spray the tops with water (use only purified water from the tank next to the refrigerator, not tap water!) Take each bagel and dip it into the topping. Top one rack with garlic topping, one rack with onion topping, and one rack with poppy seeds. Each bagel should be



How to Thaw, Top, and Bake Bagels

Introduction

You must complete three procedures to make bagels:

- thawing
- topping, and
- baking.

Thawing procedure

Follow the steps in the table below to thaw the bagels.

Warning! Plan baking times carefully so that the bagels do not remain on the racks for more than four hours after thawing. Bagels that are thawed for more than four hours must be discarded!

Step	Action								
1	Dry the stainless steel thawing trays. <i>Note:</i> Dry trays prevent sticking.								
2	Place about 20 bagels on each tray, spacing them at least five inches apart, so that they do not touch as they expand during thawing.								
3	The information in the table below explains what to do next. <table border="1"><thead><tr><th>If you want to thaw the bagels in ...</th><th>Then place the trays ...</th></tr></thead><tbody><tr><td>1½ to 2 hours</td><td><ul style="list-style-type: none">• on every other shelf of the rack, and• do not close the covers.</td></tr><tr><td>4 hours</td><td><ul style="list-style-type: none">• on every shelf of the rack, and• close the covers.</td></tr><tr><td>4 to 24 hours</td><td><ul style="list-style-type: none">• on every shelf of the rack, and• put the rack in the refrigerator.</td></tr></tbody></table>	If you want to thaw the bagels in ...	Then place the trays ...	1½ to 2 hours	<ul style="list-style-type: none">• on every other shelf of the rack, and• do not close the covers.	4 hours	<ul style="list-style-type: none">• on every shelf of the rack, and• close the covers.	4 to 24 hours	<ul style="list-style-type: none">• on every shelf of the rack, and• put the rack in the refrigerator.
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Readable Documents = Fewer User Tickets

Being accurate is only half the job.

You MUST consider your audience, or your documentation will not be read.

Or, users will read the document but fail to find what they need, and then proceed to bother you.

Additional Readability Tips

- ▶ **DO NOT WRITE ALL YOUR TEXT IN ALL CAPS.**
- ▶ **Choose a type size that is easy to read.**
 - ▶ 48 pt. for posters
 - ▶ 24-36 pt. for presentations
 - ▶ 10-12 pt. for text
 - ▶ 8 pt. for footnotes
- ▶ **Stick with no more than two fonts: one for headings and subheadings and another for body text.**

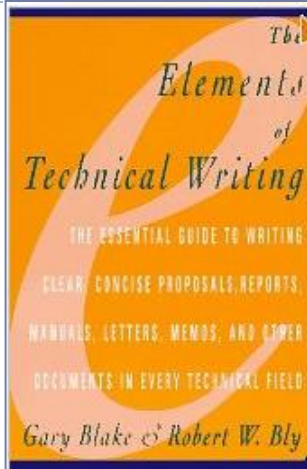
Break Up The Gray

- ▶ **Chunking:** Organize text into meaningful, related “chunks.”
 - ▶ Sentences should average between 15 and 25 words. Sentences with more than 30 words can create confusion.
 - ▶ Non-specialists prefer shorter paragraphs; technical audiences tend to tolerate longer paragraphs.
- ▶ Use screen captures, flow charts, illustrations, and even video in place of text.
- ▶ Organize data into tables or matrices, figures, and bulleted or numbered lists.
- ▶ Use white space for association, emphasis, and hierarchy.

Use Plain Language

- ▶ Avoid needless complexity. One common mistake is to stack too many adjectives into phrases (especially meaningless ones).
- ▶ **Example:** "MonkeyWrench Pro is a Web-based, user-driven, full-featured, interactive application that will organize your data files for the cost of a few bananas."
- ▶ **Better:** "MonkeyWrench Pro is a Web application that organizes your data for the cost of a few bananas."

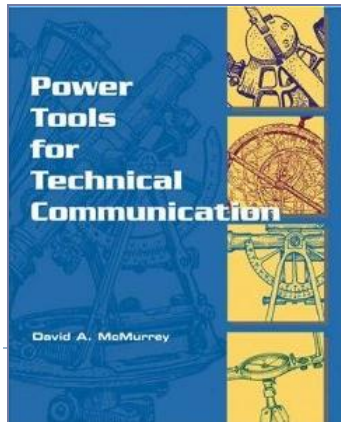
More Resources



- ▶ The Elements of Technical Writing, by Gary Blake & Robert W. Bly, available on Amazon



- ▶ Information Mapping courses, www.infomap.com



- ▶ Power Tools for Technical Communication by David A. McMurray
- ▶ Online version located at: <http://www.io.com/~hcexres/textbook/>

Final Thought

Effective documentation is not an afterthought or "nice-to-have," nor is it something that can only be produced by professional writers.

It is an integral part of every software release, and every programmer and engineer can produce useful, readability documents.