User Documentation:

Do We Even Need This Stuff?
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Genwest
A few assumptions about you...

You build things.

You want your users to be able to use those things effectively and efficiently.
What is User Documentation?
What is User Documentation? (slide 2 of 5)

Any tool provided to help the user understand...

- What the Product Is
- What the User Can Do With It
- How to Do Those Things
- How it Impacts Them
What is User Documentation? (slide 3 of 5)

(This is a pretty broad definition.)
What is User Documentation? (slide 4 of 5)

We’ve been doing this for a while.

The first known “technical manual” in English was written by Chaucer in 1326 when he described to a young boy how to use an astrolabe (a guide to the stars).
What is User Documentation? (slide 5 of 5)

User documentation can take many, many forms. As technology advances, we’ll see more and more forms of user documentation.
Is It Actually Used? (slide 1 of 6)

Anyone who has created products has run into the unfortunate situation of users asking questions that are answered—clearly and concisely—in the user documentation.

Which leads us to ask...

Do Users Even Read This Stuff?
A handful of research studies have previously been carried out to determine whether users are indeed reluctant to consult the documentation that is delivered with a product, and these are surprisingly unanimous in their findings. ... However, they invariably conclude that—at least for complex and unfamiliar products—the documentation is consulted; even if it is not read, marked, learned, and inwardly digested in its entirety.
## Is It Actually Used? (slide 3 of 6)

<table>
<thead>
<tr>
<th>% “Yes”</th>
<th>N</th>
<th>Consultation of</th>
<th>Reference</th>
</tr>
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<tbody>
<tr>
<td>82.9</td>
<td>44</td>
<td>the printed documentation for complex equipment such as VCRs</td>
<td>P. Wright, Creighton, and Threlfall, 1982</td>
</tr>
<tr>
<td>96.0</td>
<td>201</td>
<td>instruction manuals</td>
<td>Schriver, 1997</td>
</tr>
<tr>
<td>99.0</td>
<td>400</td>
<td>the printed manual for a major word processing program</td>
<td>Smart, DeTienne, and Whiting, 1998; Smart, Whiting, and DeTienne, 2001</td>
</tr>
<tr>
<td>65.0</td>
<td>400</td>
<td>the online Help for a major word processing program</td>
<td>Smart et al., 1998; Smart et al., 2001</td>
</tr>
<tr>
<td>95.5</td>
<td>224</td>
<td>the printed manual for an accounting software package</td>
<td>Vromen and Overduin, 2000</td>
</tr>
<tr>
<td>58.9</td>
<td>36</td>
<td>the manual of the vehicle that they drive most often</td>
<td>Mehlenbacher, Wogalter, and Laughery, 2002</td>
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<tr>
<td>92.0</td>
<td>201</td>
<td>the manual that comes with a product they buy</td>
<td>Jansen and Balijon, 2002</td>
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<tr>
<td>59.0</td>
<td>107</td>
<td>the printed manual for any piece of software</td>
<td>Martin, Ivory, Megraw, and Slabosky, 2005</td>
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<tr>
<td>57.0</td>
<td>107</td>
<td>the online Help for any piece of software</td>
<td>Martin et al., 2005</td>
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<tr>
<td>91.2</td>
<td>70</td>
<td>product manuals for technological products</td>
<td>Tsai, Rogers, and Lee, 2012</td>
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</table>

(older adults)
Time and again it is found that **ease of access** and **convenience** are the strongest determinants for the choice of an information source, with **online browsing** as the single most popular method for seeking information (e.g., Connaway, Dickey, and Radford, 2011; Fast and Campbell, 2004; Julien and Michels, 2004; Kim and Sin, 2011).
Yes, users do rely on documentation.

(But it has to be easy and convenient, and probably available online.)
Even if users read your documentation, if your documentation isn’t *user-friendly*, it won’t solve their problem.

Poorly-created documentation might cause people to **abandon your tool** or **lose trust in your agency**.

Creating user-friendly documentation takes time, but it takes far more time to build back trust.
How Do We Make User-Friendly Documentation?
How Do We Make User-Friendly Documentation? (slide 2 of 8)

Approach the creation of your documentation as you would the creation of any other tool. First, determine the objective of a specific piece of documentation.

Is your goal to...

- **Introduce**—Tell the user what the program does or what problem it solves for them
- **Teach**—Teach the user how to do certain tasks
- **Reference**—Provide reference information
- **Connect**—Provide the user with ways to learn more
- **Satisfy**—Fulfill developer or legal requirements
Sometimes a specific piece of documentation can serve more than one purpose.
How Do We Make User-Friendly Documentation? (slide 6 of 8)

- **Teach**
  - Whistleblower Protection
  - Privacy Policy

- **Reference**
  - Site Map

- **Satisfy**
  - Contact Us

- **Connect**
How Do We Make User-Friendly Documentation? (slide 7 of 8)

Decide if your documentation is meant to be **informative** or **actionable**. Try to avoid overlap between the two, since it dilutes the purpose of your documentation.

Actionable documentation works best when it...

- Uses short sentences
- Uses second-person language (Say “Open your welcome packet” instead of “Applicants should open their welcome packet”)
- Incorporates steps, lists, or bullets
- Starts sentences with clear verbs
- Puts reference information elsewhere
How Do We Make User-Friendly Documentation? (slide 8 of 8)

Although some types of documentation lend themselves more readily to certain forms (for example, actionable documentation might take the form of a tutorial or Quickstart guide), technically all types are **form-agnostic**.

Once you know the purpose of your documentation, it’s up to you to determine the right form, and when and where to present it.

Some common forms of user documentation include...
Welcome Screen (slide 1 of 2)

This is an opportunity to introduce your program, provide a high-level overview, or explain the first steps to begin using the program.
Welcome Screen (slide 2 of 2)

To indent a message or quote with several sentences or paragraphs, start with >>>

- Your friends at Slack
If you’d like to highlight certain features of your program or show users how to navigate the product, consider adding a product tour.

• This should be short and sweet—no more than a few steps.
• Always let users opt out.
**These are your channels**

Channels are chat rooms created by people in your Slack team. You’ve been added to some channels already. Channels can be public or private, and you can join any public channel in MindtheProduct.

Done? Click here to skip.
Product Tour (slide 3 of 3)

New Message

Kristen Faiferlick - NOAA Affiliate

Subject

--

Kristen Faiferlick
UX and Technical Writer (Genwest Systems)
NOAA’s Office of Response and Restoration
Emergency Response Division
Seattle, WA
206-526-6321

Screen Shot 2019-05-09 at 9.06.45 PM.png (141K)

Send

Send Later

Did you know?

You can request a read receipt and track clicks on links in your message. We will notify you when someone reads your email or clicks a link.

To get started, click the "Request read receipt and track clicks" button below.

Nifty!
Interactive Tour (slide 1 of 2)

You can make your product tour an interactive tour by letting users actually TRY the feature.
Interactive Tour (slide 2 of 2)
Embedded Help (slide 1 of 3)

Give users just-in-time guidance that they can access as they use the program at their own pace.
Embedded Help (slide 2 of 3)

Give users just-in-time guidance that they can access as they use the program at their own pace.
Embedded Help (slide 3 of 3)

Give users just-in-time guidance that they can access as they use the program at their own pace.
If you know that your users want to digest information outside the program, or will be looking for resources in other places (like Youtube), consider a tutorial that they can download or access outside of the program.
Welcome to the self-paced Military Voter training. This training provides information to help you successfully register to vote, request your absentee ballot and successfully cast your ballot.

This training covers two areas:

1. Background information on UOCAVA
2. Available resources for military voters
Support Articles (slide 1 of 3)

Support articles are usually a series of articles or pages that the user can search through to find help on a specific topic.

The individual articles are generally actionable and together, form a help or knowledge base or support center.
Support Articles (slide 2 of 3)

Getting or Renewing a U.S. Passport

How to apply, renew, or quickly get a passport. Also, learn how to get a passport for a child, check the status of your application, and how much it costs to get a passport.

On This Page

- Infographic: How to Get or Renew a U.S. Passport
- Renew a U.S. Passport
- Infographic: 8 Steps to Apply for a Child’s Passport
- Check the Status of Your Passport
- Apply for a U.S. Passport
- Get a Passport Quickly
- Passports for Minors Under the Age of 18
- Passport Fees
Access and manage your VA benefits and health care

**Health care**
- Refill and track your prescriptions
- Send a secure message to your health care team
- Schedule and view your appointments
- View your lab and test results
- Apply now for VA health care

**Disability**
- Check your claim or appeal status
- View your payment history
- Upload evidence to support your claim
- File for a VA disability increase
- File a claim for compensation

**Education**
- [Link to Education information]

**Records**
- [Link to Records information]
Checklists can be a good way to prompt users to take additional steps or explore additional features.

- **Create your first note**
  Capture your thoughts

- **Set a reminder**
  Never forget again

- **Save web articles**
  Keep what interests you

- **Sync to your phone and computer**
  Have it everywhere
Bots and “Helpers”

Bots usually serve to help direct users to the right resource within a help center, or to collect more information before passing the user to human support or sales.
If your product is a physical object, printed materials may be appropriate. These materials can be short-and-sweet, like assembly diagrams, or extensive, like printed user manuals.
Printed Materials (slide 2 of 2)

(Of course, if your instructions aren't clear, users will look elsewhere.)
And really, anything else you can imagine.

Vlogs, story maps, webinars, audio files, pages in the website footer, and more.

What possibilities will AR and VR open for us?
So, which form should I choose?

• Know your users. Leverage research and data you gained when you created the original product.
• Talk to your outreach, marketing, sales, or support teams (if you have them) to see how users like to get information.
• Look at Google Analytics to see what questions people have and what resources they’re using to find answers.
• If you don’t have this data or can’t get it, make an educated guess and test the documentation with users.
Tips for Creating Good Documentation
Tips for Creating Good Documentation (slide 2 of 5)

For actionable documentation, provide “just-in-time” support.

• Idea borrowed from Behavioral Economics, practiced heavily in financial literacy training

• Humans place their most immediate needs first, and aren’t going read something or act on it when they have other more immediate needs.

• Give them what they need right as they need it, not a moment earlier.
Don’t force your users to change their habits. They won’t.
Incorporate graphics.

NYC Recycles Even More
We can now accept your yogurt containers, plastic cups, and more rigid plastics!

Cardboard  Mixed Paper  Metal  Glass  Plastic  Cartons
Tips for Creating Good Documentation (slide 5 of 5)

How to Get or Renew a U.S. Passport

RENEW a passport by mail
You can renew your passport only if it’s undamaged and all of the following apply:
- It was issued less than 15 years ago.
- You were 16 or older when you got it.
- It’s in your current name (or you can legally document the name change).

What you’ll need to provide

- Form DS-82
- Your eligible passport book
- Proof of name change if your name is different than the one on your old passport (marriage certificate or court order)
- Fee payment (check or money order)
- Color passport photo

Apply for a NEW passport in person
For any of the following:
- It’s your first passport.
- Your last passport was damaged or lost.
- Your last passport was issued more than 15 years ago.
- Your name has changed and you have no supporting legal documents.
- It’s for a child under age 16.

To get a new passport, you must go to a local passport acceptance facility. Some passport acceptance facilities require appointments. Many provide passport photos for a fee.

What you’ll need to provide

- Form DS-11
- Proof of U.S. citizenship (such as a birth or naturalization certificate)
- Government-issued photo ID (such as a driver’s license or military ID)
- Color passport photo
- Fee payment (check or money order)

Additional requirements for a child’s passport

- Both parents and the child must appear in person or submit a consent form signed by an absent parent.
- Proof of relationship to child

How long does it take to get or renew a passport?
Processing times change seasonally. Always check travel.state.gov for current estimates. Typically:
- Routine service - 4-6 weeks (by mail or in person)
- Expedited service - 2-3 weeks (by mail or in person)
- Expedited service at agency locations - 8 business days, based on either of the following needs:
  1. Immediate life or death emergency
  2. Traveling within two weeks

Requirements for expedited service at passport agency locations
- You must show proof of emergency or upcoming travel in person at one of 26 regional passport agencies.
- You must have an appointment. Schedule one online at passportapptonline.travel.state.gov or call the National Passport Information Center at 1-877-487-2778.

Passport Book vs. Passport Card

Passport Book
- Required for all international air travel
- Valid for all travel destinations
- Valid for travel by air, land, or sea

Passport Card
- Valid for international travel by land or sea to Canada, Mexico, the Caribbean, and Bermuda only
- Costs less than the passport book
- Wallet size

To learn more, visit travel.state.gov/passports
1-877-487-2778 / 1-888-674-7793 (TTY/TDD) 24/7

Brought to you by
Test Your Documentation

Treat it like a feature in your program—one that you’d test and iterate the same as any other feature.

This is hard. Documentation often comes last, and it never feels like there’s enough time.
Common Pitfalls (What Documentation Should NOT Be)

• An excuse for difficult-to-use tools ("We’ll just explain that in the help articles.")
• A dumping ground ("We can add an FAQ about that.")
• Something you create and forget. Every time you update your tool, you need to update your documentation.
• Beyond your technical limitations
• A chance to go into insane detail about the technical elements (unless your tool is highly technical and you know your users need this)
• Inaccessible (learn about Section 508 compliance)
Summary

• Know the purpose of what you’re creating. What exactly is it trying to accomplish?
  • If it’s supposed to be actionable, it’s extra important to be clear and concise.

• Leverage a Human Centered Design approach to your product as well as your documentation.
  • Know your users and their needs. Meet them where they’re at.
  • Test your documentation, the same way you’d test your product.

• Start small. You can’t do everything at once (and shouldn’t try).
Resources

- **Section 508 (accessibility) Information**
- **Plain Language Guidelines**
- Other interesting articles on user documentation (this is not an endorsement of any product or company):
  - Plan.io blog post on technical documentation
  - TryChameleon blog post on technical documentation
  - Divio blog post on technical documentation
Thank You

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