



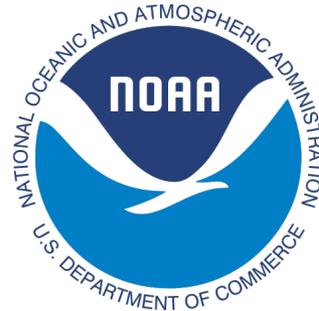
User Documentation:

Do We Even Need
This Stuff?



Kristen Faiferlick

User Experience (UX) Writer & Designer

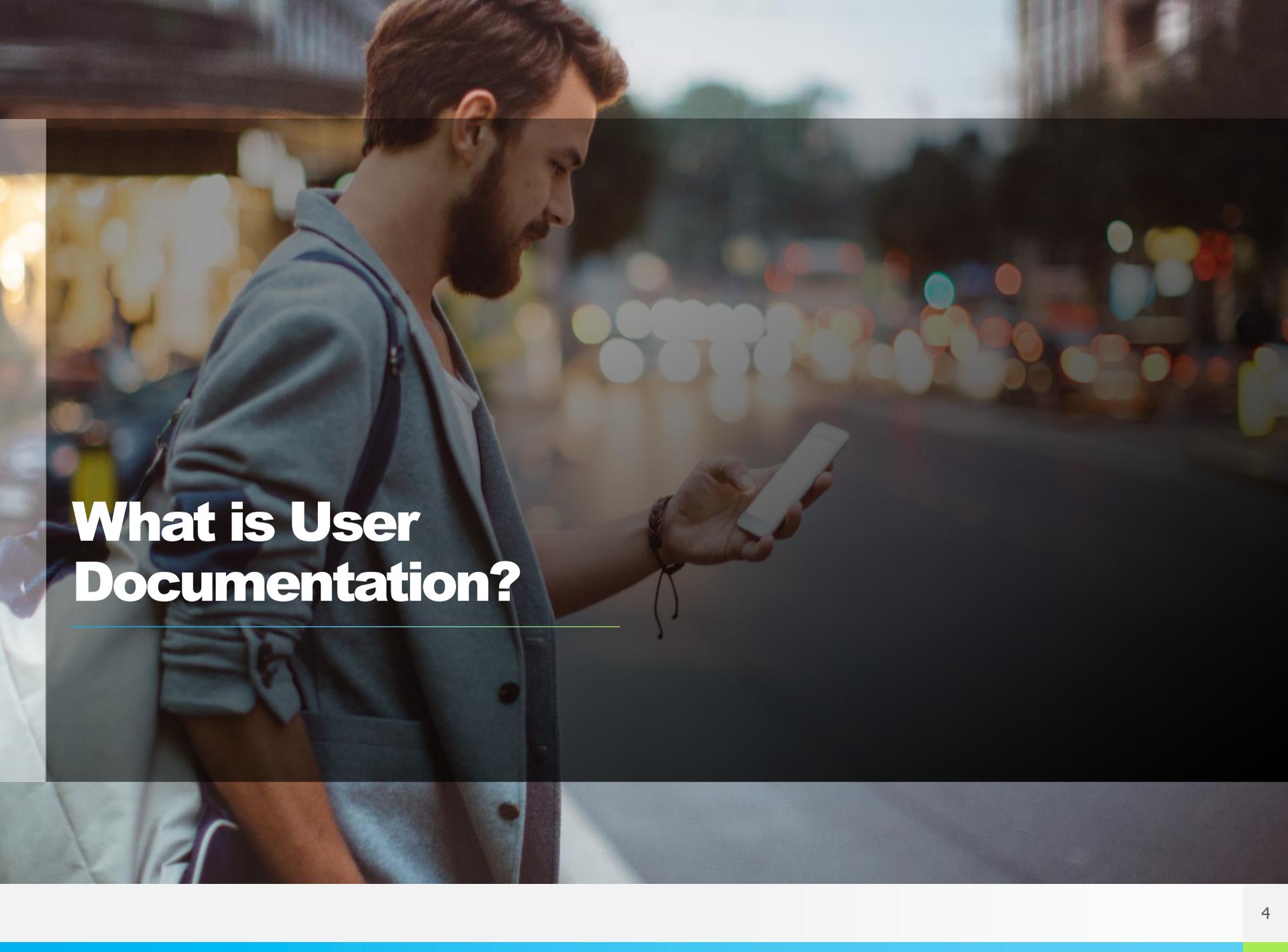


Genwest

A few assumptions about you...

You build things.

You want your users to be able to use those things effectively and efficiently.

A man with a beard and short brown hair is shown in profile, looking down at a white smartphone he is holding in his right hand. He is wearing a light blue button-down shirt and has a dark strap over his shoulder. The background is a blurred city street at night, with various lights creating a bokeh effect. The overall scene is dimly lit, with the primary light source being the ambient city lights.

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?

Is It Actually Used? (slide 2 of 6)

“ 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. ”

[“Nobody reads the documentation”: true or not?](#)

Brigit van Loggem

Open Universiteit, Heerlen, the Netherlands, September 2014

Is It Actually Used? (slide 3 of 6)

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

Is It Actually Used? (slide 4 of 6)

“

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).

”

[“Nobody reads the documentation”: true or not?](#)

Brigit van Loggem

Open Universiteit, Heerlen, the Netherlands, September 2014

Is It Actually Used? (slide 5 of 6)

Yes, users do rely on documentation.

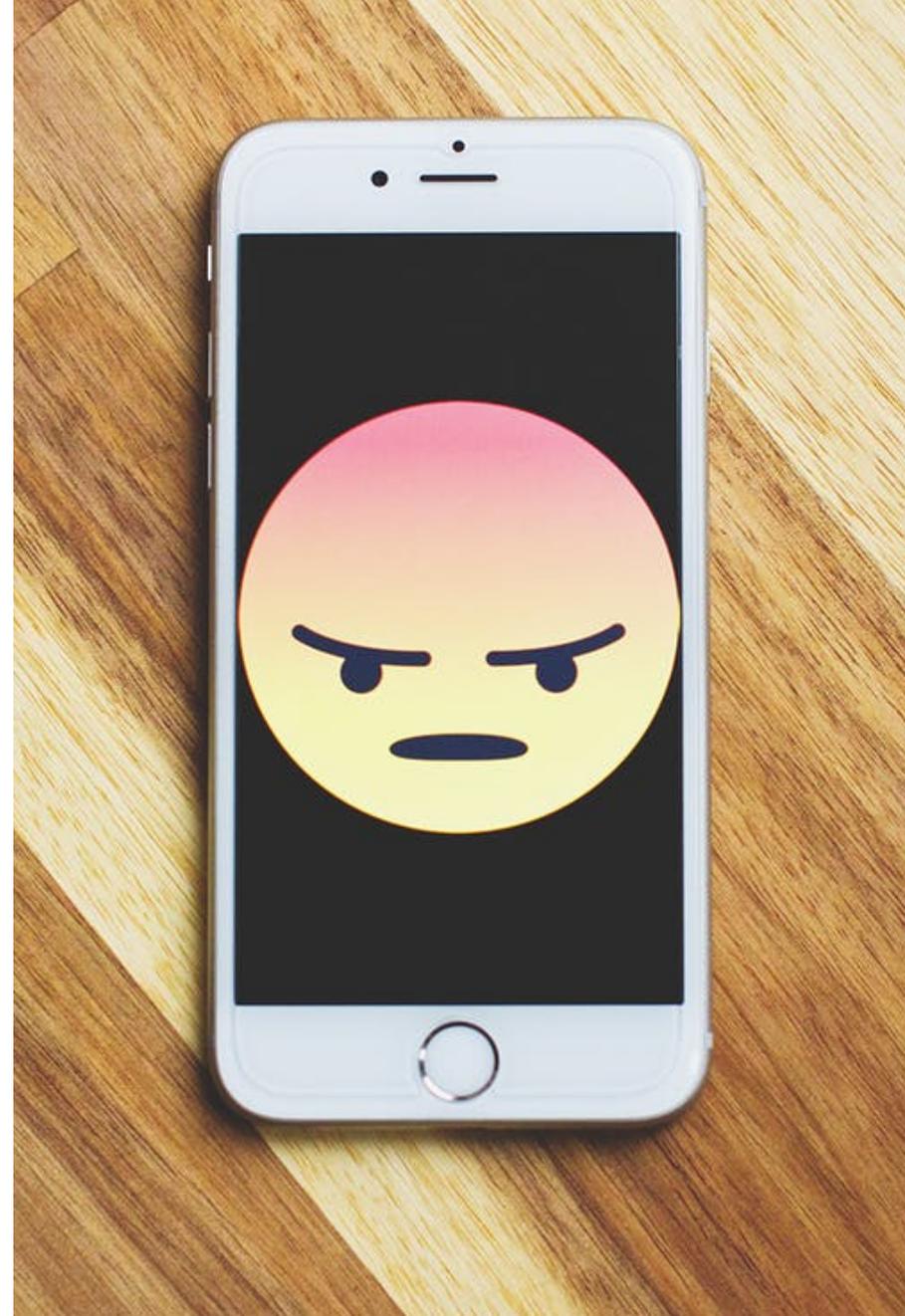
(But it has to be easy and convenient, and probably available online.)

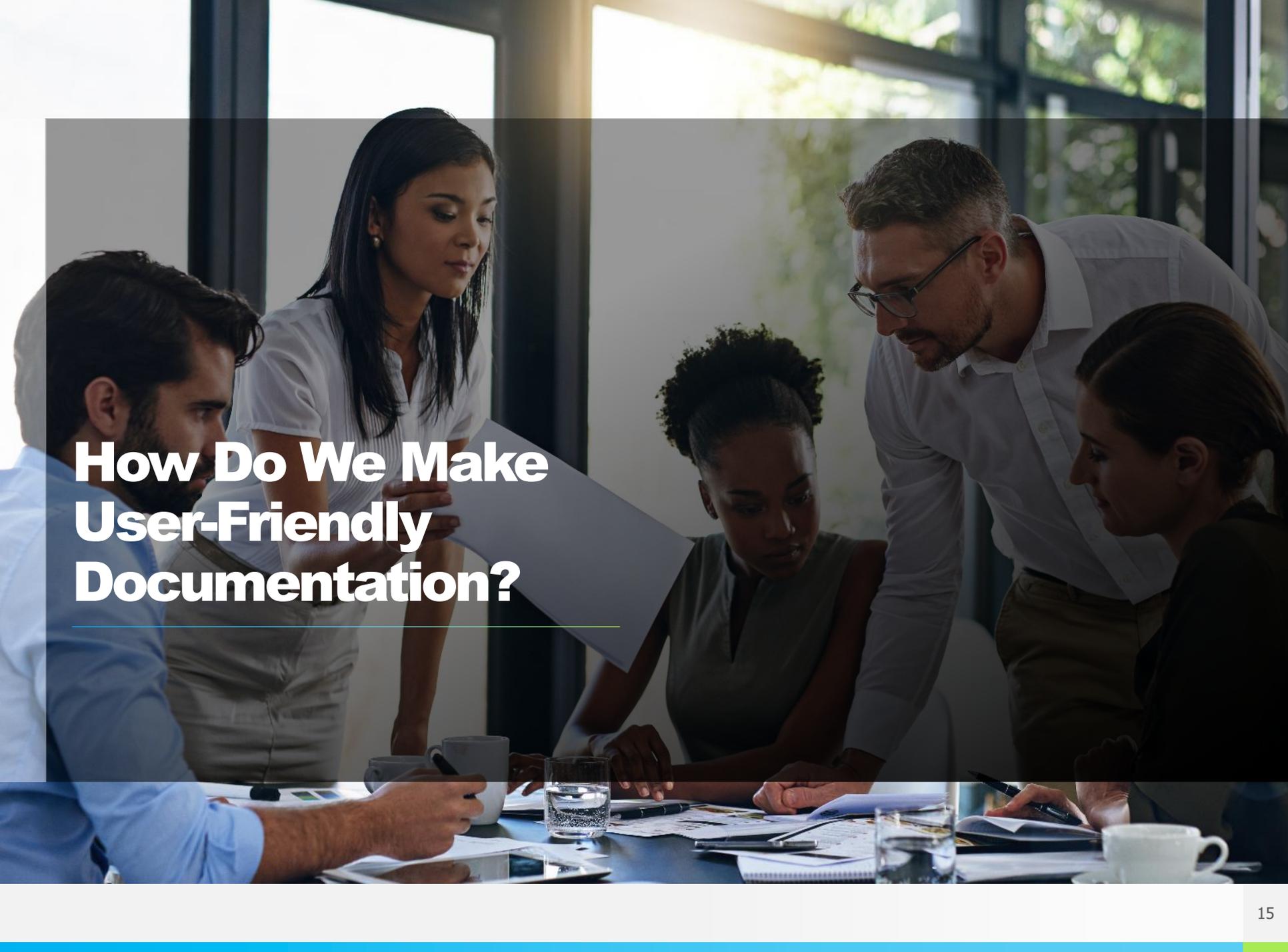
Is It Actually Used? (slide 6 of 6)

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

Informative

Actionable

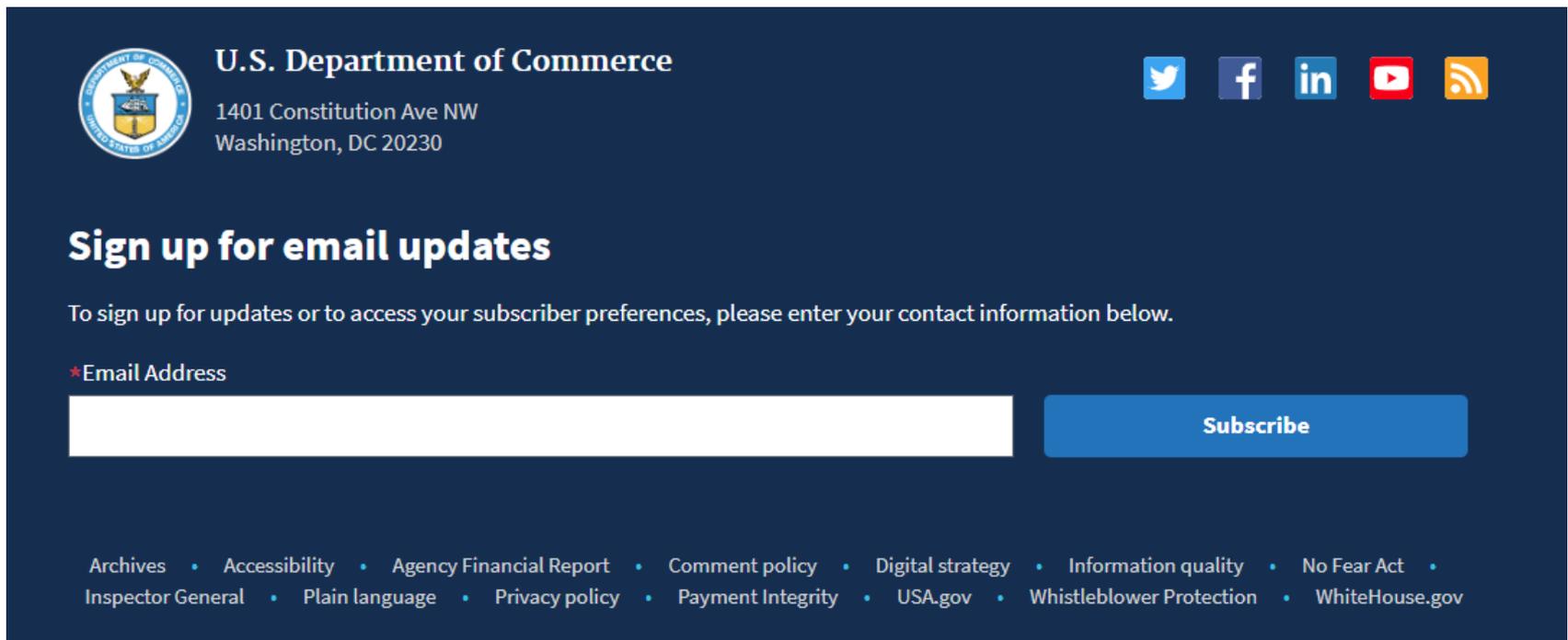
Informative

Either

Either

How Do We Make User-Friendly Documentation? (slide 5 of 8)

Sometimes a specific piece of documentation can serve more than one purpose.



The screenshot shows the U.S. Department of Commerce website header and a sign-up form. The header includes the department's logo, name, and address: "U.S. Department of Commerce", "1401 Constitution Ave NW", "Washington, DC 20230". To the right are social media icons for Twitter, Facebook, LinkedIn, YouTube, and RSS. Below the header is a "Sign up for email updates" section with a sub-header "Sign up for email updates" and a prompt: "To sign up for updates or to access your subscriber preferences, please enter your contact information below." A form field labeled "*Email Address" is followed by a "Subscribe" button. At the bottom, a navigation menu lists various links: Archives, Accessibility, Agency Financial Report, Comment policy, Digital strategy, Information quality, No Fear Act, Inspector General, Plain language, Privacy policy, Payment Integrity, USA.gov, Whistleblower Protection, and WhiteHouse.gov.

 **U.S. Department of Commerce**
1401 Constitution Ave NW
Washington, DC 20230

[Twitter](#) [Facebook](#) [LinkedIn](#) [YouTube](#) [RSS](#)

Sign up for email updates

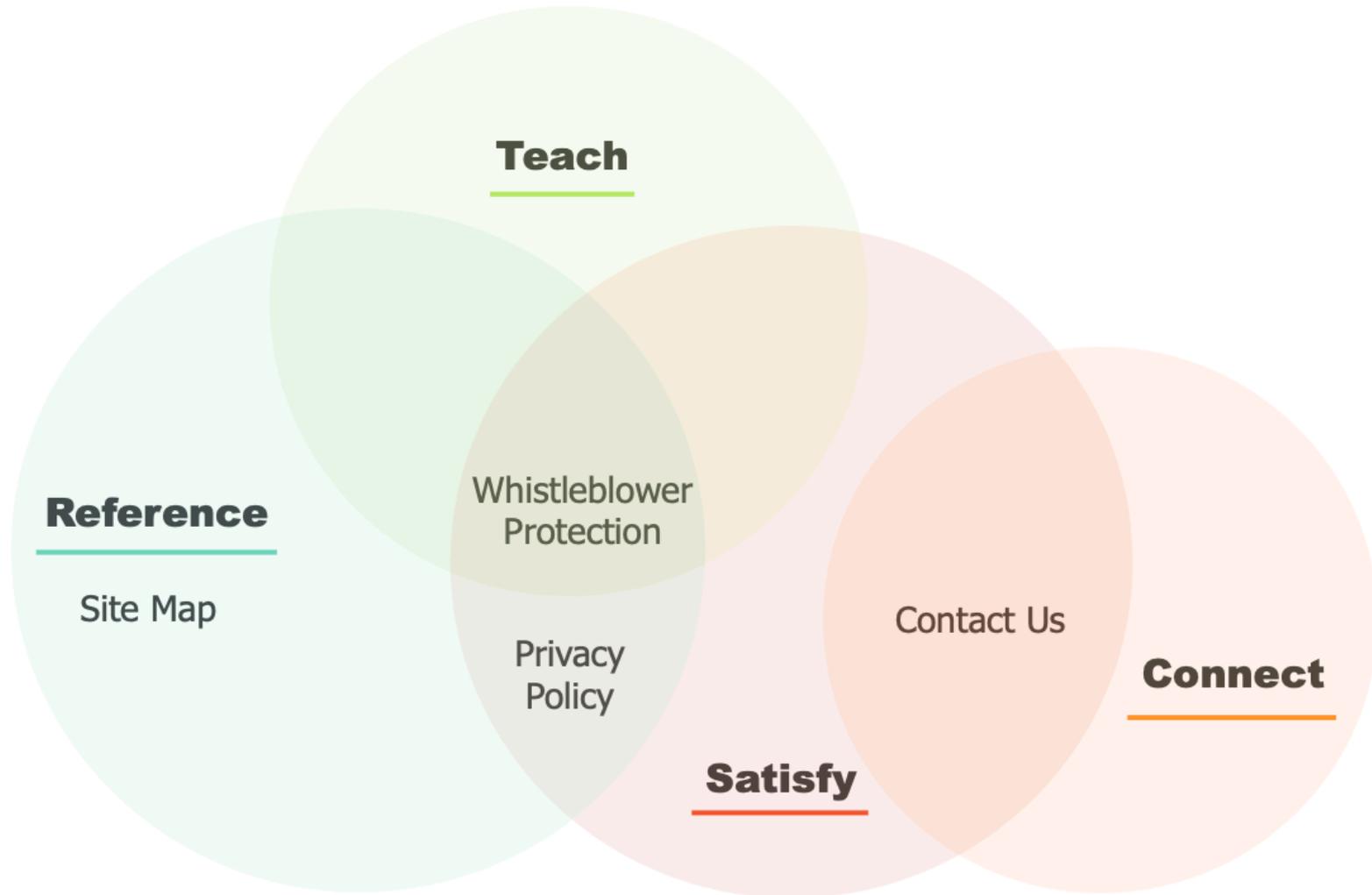
To sign up for updates or to access your subscriber preferences, please enter your contact information below.

*Email Address

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How Do We Make User-Friendly Documentation? (slide 6 of 8)



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 to Data Studio! (Start here)

Pages <

Interact with a report

Copy and edit a report

Edit and add charts

Date range and filter properties

Connect to your data

You want charts? We got charts!

Share reports and data sources

Track reports with Google Analytics

Let anyone see their data in your reports

Next steps

4

5

1 Welcome 2 Terms 3 Preferences

Welcome to Google Data Studio

Turn your data into informative dashboards and reports that are easy to read, easy to share, and fully customizable. Data Studio allows you to tell great data stories to support better business decisions.

[GET STARTED](#)

- Connect**
Easily connect to all your data source. Connect to multiple Data Sources within one report.
- Visualize**
Select a variety of visualizations. Custom layout and themes. Apply dimensions and metrics. Create custom metrics.
- Share**
Easy sharing. Individuals, groups of users, public. Realtime collaboration.

Google Analytics Data → [Example] Google Analytics Data

World Population Data 2005 - 2014 → [Example] World Population Data 2005 - 2014

ied report

ed report. For example, you can replace the

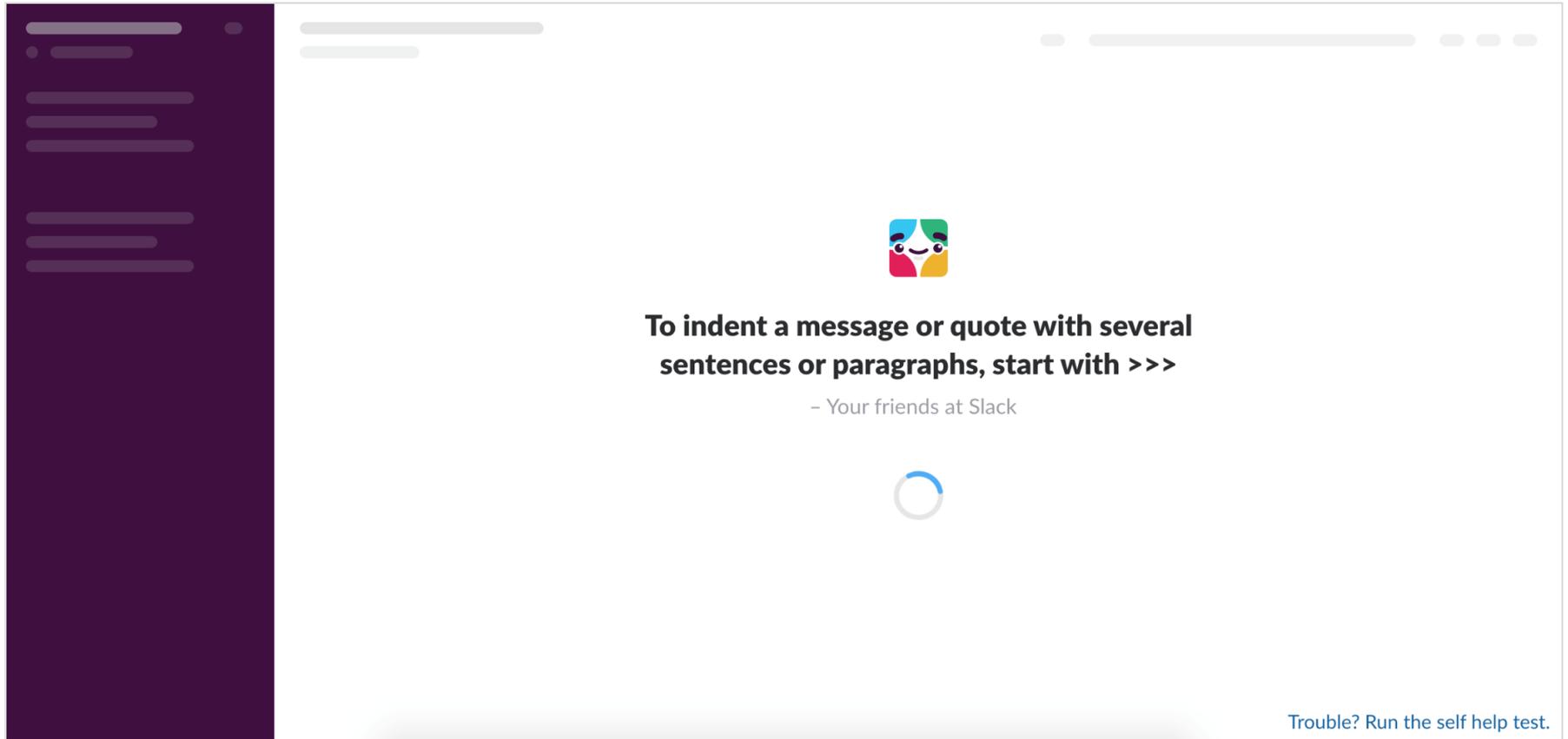
th your own Analytics data source (if you've

can only add data sources to which you have access.

If the new data source you add has a

YouTube Analytics

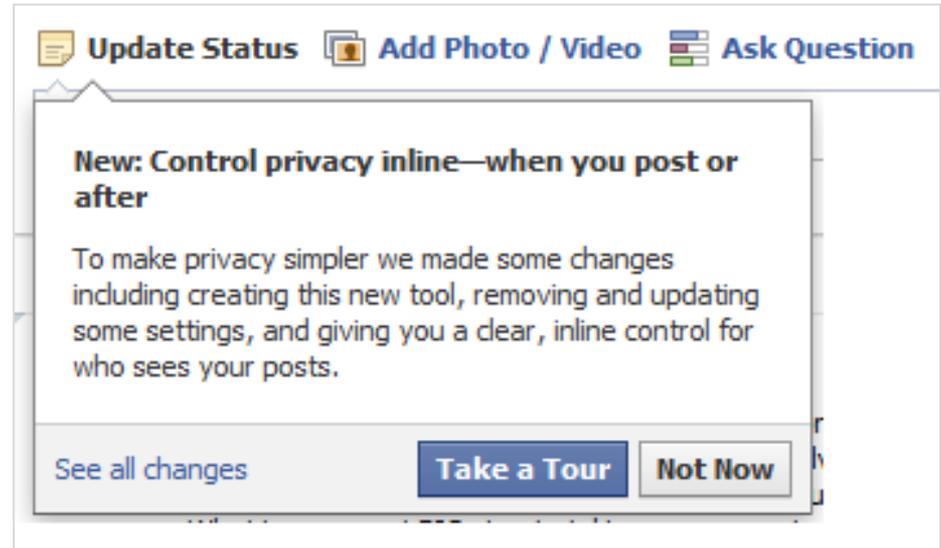
Welcome Screen (slide 2 of 2)



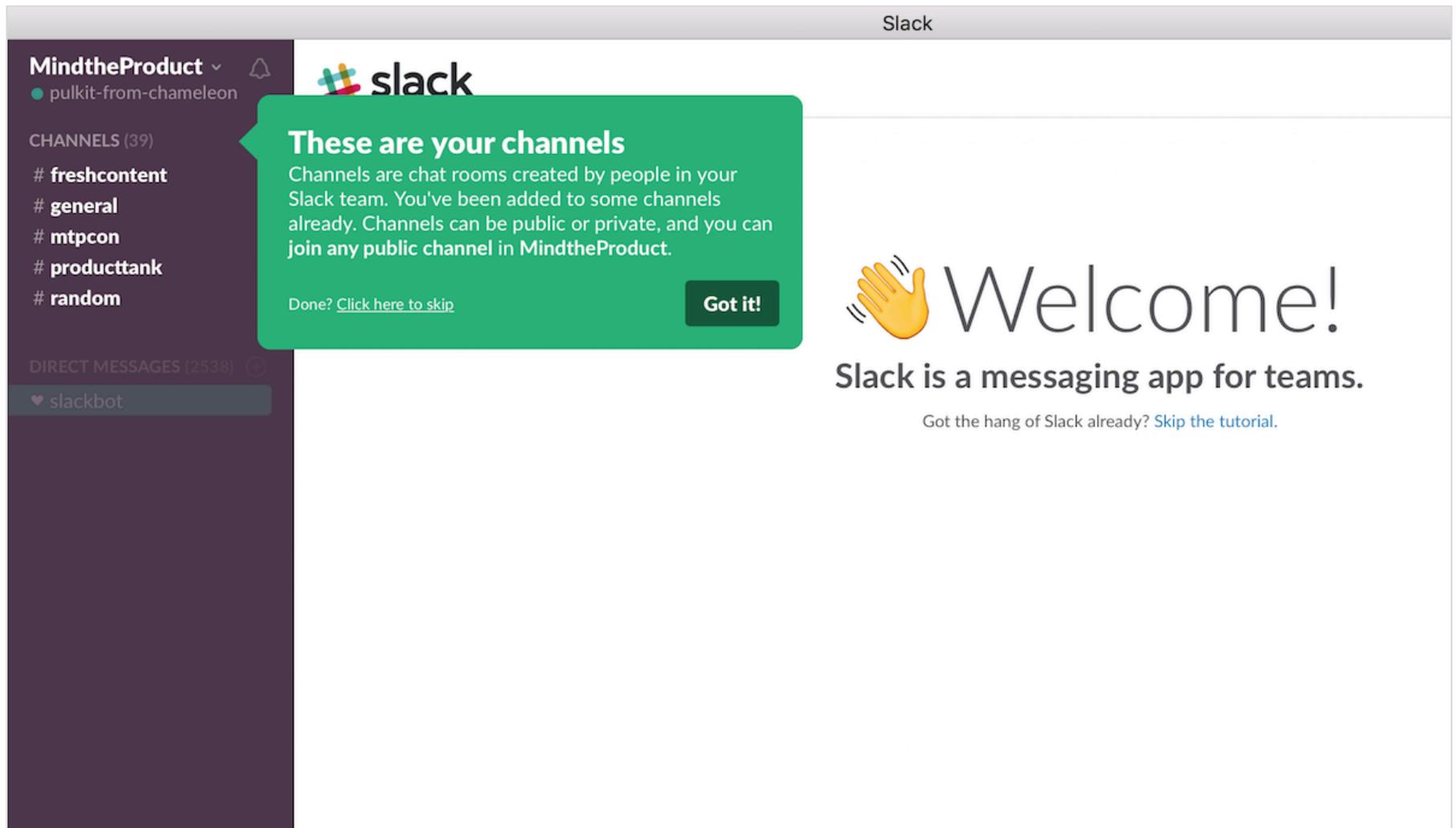
Product Tour (slide 1 of 3)

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.



Product Tour (slide 2 of 3)



The screenshot shows the Slack interface for a workspace named "MindtheProduct". On the left sidebar, there is a list of channels: #freshcontent, #general, #mtpcon, #producttank, and #random. Below the channels is a section for direct messages, showing a message from "slackbot". A green callout box is overlaid on the channel list, containing the text "These are your channels" and a description of channels. A "Got it!" button is located at the bottom right of the callout box. The main content area displays a "Welcome!" message with a hand emoji, followed by the text "Slack is a messaging app for teams." and a link to "Skip the tutorial."

Slack

MindtheProduct 
● pulkit-from-chameleon

CHANNELS (39)

- # freshcontent
- # general
- # mtpcon
- # producttank
- # random

DIRECT MESSAGES (2538) 

- ♥ slackbot

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](#)

Got it!

 **Welcome!**

Slack is a messaging app for teams.

Got the hang of Slack already? [Skip the tutorial.](#)

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) ✕

↶ ↷ Sans Serif ▾ ↑↓ **B** *I* U A ▾ ☰ ☰ ☰ ☰ ☰ ☰

Send ▾ A 📎 🔗 😊 📁 🖼️

Send Later Boomerang this ▾ 🏠?

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!

dable ?

Interactive Tour (slide 1 of 2)

You can make your product tour an interactive tour by letting users actually TRY the feature.

Welcome to Mailbox

There are five zones in Mailbox, and you swipe messages to move between them.

New Mail

Get Started

Swipe Right to Archive

Archive lives to the right of Mailbox. Try archiving the message below.

Great Job!

You can quickly access your archive from the navigation bar and in the "All Mail" folder in Gmail

Next

Sender	Time	Subject	Preview	Action
Lizzy Armour	8:34 AM	Breakfast?	Hey I was thinking about heading in a little early this morning and grabbing some breakfast before our	>
Jetsetter	7:59 AM	Every Morgans Hotel, Plus St. Lucia...	New York Chicago San Francisco Las Vegas Mexico Caribbean Paris Sales in the spotlight	>
Chase Online Banking	7:45 AM	Your Statement is Now Available	Login to your Chase online banking account to view your statement for November...	>
Samantha & Me	Nov 7	coffee table?	Yes, since he's local he offered a discount, so I think we're going to go meet up with him later on this...	>

Interactive Tour (slide 2 of 2)

Welcome to Data Studio! (Start here)

Pages <

Interact with a report

- Copy and edit a report
- Edit and add charts
- Date range and filter properties
- Connect to your data
- You want charts? We got charts!
- Share reports and data sources
- Track reports with Google Analytics
- Let anyone see their data in your reports
- Next steps

Change pages [X]

To change pages, use the menu on the left, or press the right and left arrow keys.

To minimize the page menu, click <

To expand the page menu, click ☰

BACK NEXT

create a Data Studio report

Sessions

Source	Sessions
1. google	24,880
2. (direct)	11,887
3. mall.googleplex.com	8,396
	3,702
	2,842

1 - 10 / 461 < >

2 Set the date and filter your data

Change the time frame using the date range control. The checkboxes in a filter controls let you refine the data according to the dimension values you select.

Dec 12, 2018 - Jan 10, 2019

Sessions **64,387**

User Type

- New Visitor
- Returning Visitor

Top 5 mobile devices

- iPhone 47.8%
- iPad 36.9%
- Pixel 2 XL
- Pixel 3 XL
- others

what percentage of returning users were iPhone users?

Try changing the date to show the last 7 days including...

Click on a column header to sort the table by that column.

...this chart to see the data points...

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.

The screenshot shows the WebGNOME application interface. At the top, there is a navigation bar with the WebGNOME logo, a '+ New' dropdown, 'Edit', 'Save', and 'Help' menus. On the right side of the navigation bar are buttons for 'Run' (green), 'Export' (white), and several icons for map, bar chart, refresh, and calendar. A tooltip with the text 'Get Help on Setup View' is positioned over the 'Help' menu. The main content area is titled 'Configure Your Scenario' with a question mark icon. It is divided into several panels: 'Model Settings' (left), 'Weatherers' (middle), and 'Map' (right). The 'Model Settings' panel includes fields for 'Incident Name' (Model), 'Start Time' (2019/6/18 15:00:00), and 'Duration' (1 Day(s), 0 Hour(s)), along with a checkbox for 'Include the Minimum Regret (Uncertainty) solution.'. The 'Weatherers' panel has a list of checkboxes: 'Evaporation', 'NaturalDispersion', and 'Emulsification'. The 'Map' panel shows 'Type: Infinite Ocean'. Other panels on the right include 'Point Wind', 'Water', 'Horizontal Diffusion', 'Currents', 'Gridded Winds', and 'Spill', each with a '+' icon.

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.

The screenshot shows the WebGNOME application interface. The main window has a title bar with the WebGNOME logo and menu items: '+ New', 'Edit', 'Save', and 'Help'. There are also 'Run' and 'Export' buttons. The main content area is titled 'Configure Your Scenario' and contains a 'Model Settings' panel with fields for 'Incident Name' (Model), 'Start Time' (2019/6/1), and 'Duration' (1 Day(s)). There is also a checkbox for 'Include the Minimum Regret (L)'. A help window titled 'Setup View Help' is overlaid on the interface. The help window contains the following text:

Setup View Help

Use Setup View to configure and edit a scenario to model. Individual panels are used to interact with different types of model input. Individual panels include buttons to add (+), edit (✎), and delete (🗑️) components.

Panels may contain multiple objects that can be edited individually. For example, multiple currents or winds can be added to the model and turned on/off as desired. Objects added in each panel will appear in a list at the bottom of the panel.

Although its possible to set up the model in various ways, a typical simulation will include:

- A Map
- A Spill
- A Wind (either Point or Gridded)
- A Current
- Horizontal Diffusion

If an oil is specified as the substance that is spilled, information in the Water panel will also need to be specified as the weathering of the oil will depend on some water properties.

Advanced Settings

When adding or editing a model object, a pull down list of Advanced Settings appears at the bottom of the form. Although typically modified parameters appear within the form, additional control over model parameters can be accessed via this list. Note, that it is VERY possible to change parameters through this list in such a way that the model will not be able to run (very little validation is done on parameters that

The background interface shows a list of model components: 'Water' with a '+' button, 'Map' with an edit icon and a '+' button, 'Type: Infinite Ocean', 'Horizontal Diffusion' with a '+' button, and 'Gridded Winds' with a '+' button.

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.

Add a debit or credit card ×

Card number

Name on card

Expiration date

Use this card across all of Amazon [What's this](#)

Amazon accepts all major credit and debit cards:

Tutorials (slide 1 of 2)

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.



Tutorials (slide 2 of 2)

Introduction



FVAP.gov
FEDERAL VOTING ASSISTANCE 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:

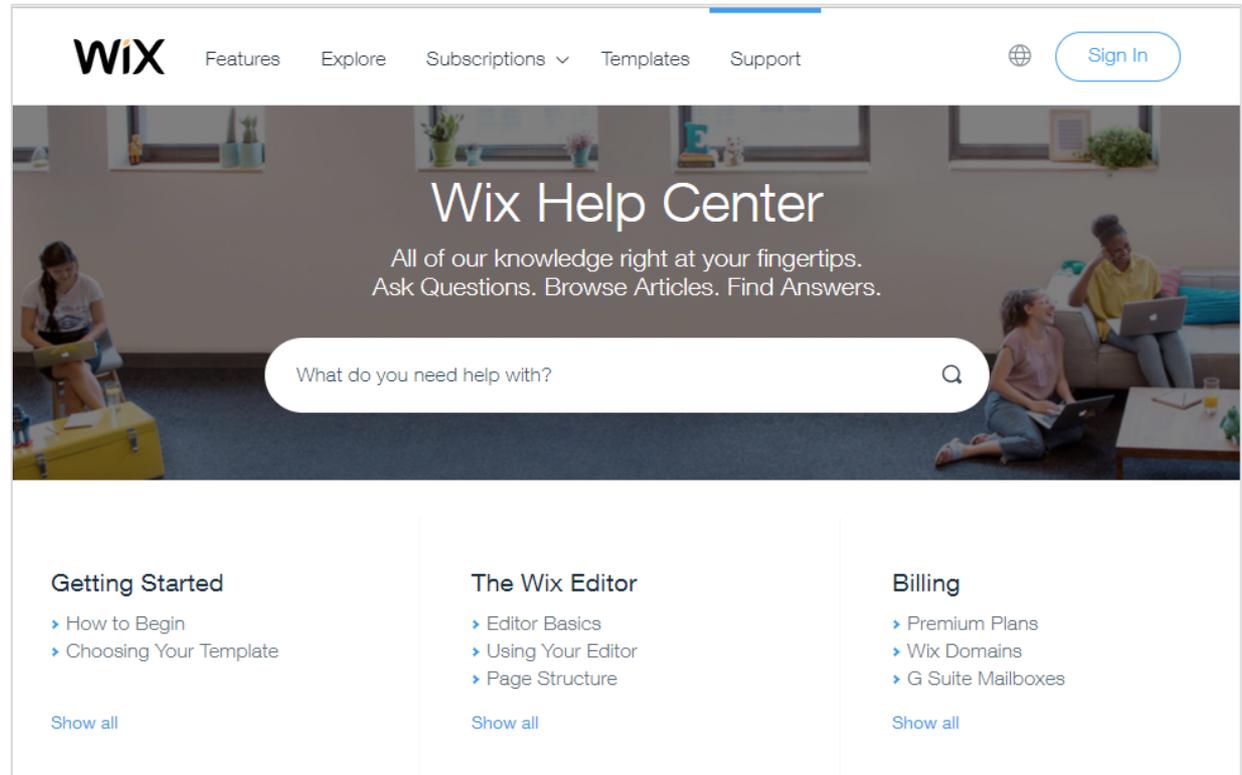
1. Background information on *UOCAVA*
2. Available resources for military voters



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)

 An official website of the United States government [Here's how you know](#) 

Search All Government  [1-844-USA-GOV1](tel:1-844-USA-GOV1)

[All Topics and Services](#) [About the U.S.](#)  [Benefits, Grants, Loans](#)  [Government Agencies and Elected Officials](#)  [Jobs and Unemployment](#)  [Money and Taxes](#)  [Travel and Immigration](#) 

[Español](#)

[< Passports and International Travel](#)

Getting or Renewing a U.S. Passport

International Travel Issues

Issues with Family Outside the U.S.

Travel Complaints

U.S. Passport Fees, Facilities or Problems

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](#)
- [Apply for a U.S. Passport](#)
- [Renew a U. S. Passport](#)
- [Get a Passport Quickly](#)
- [Infographic: 8 Steps to Apply for a Child's Passport](#)
- [Passports for Minors Under the Age of 18](#)
- [Check the Status of Your Passport](#)
- [Passport Fees](#)

Support Articles (slide 3 of 3)

An official website of the United States government [Here's how you know](#)  [Talk to the Veterans Crisis Line now](#) >

VA  U.S. Department of Veterans Affairs

Search  Contact Us  [Sign In](#)

[VA Benefits and Health Care](#)  [About VA](#)  [Find a VA Location](#)

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**

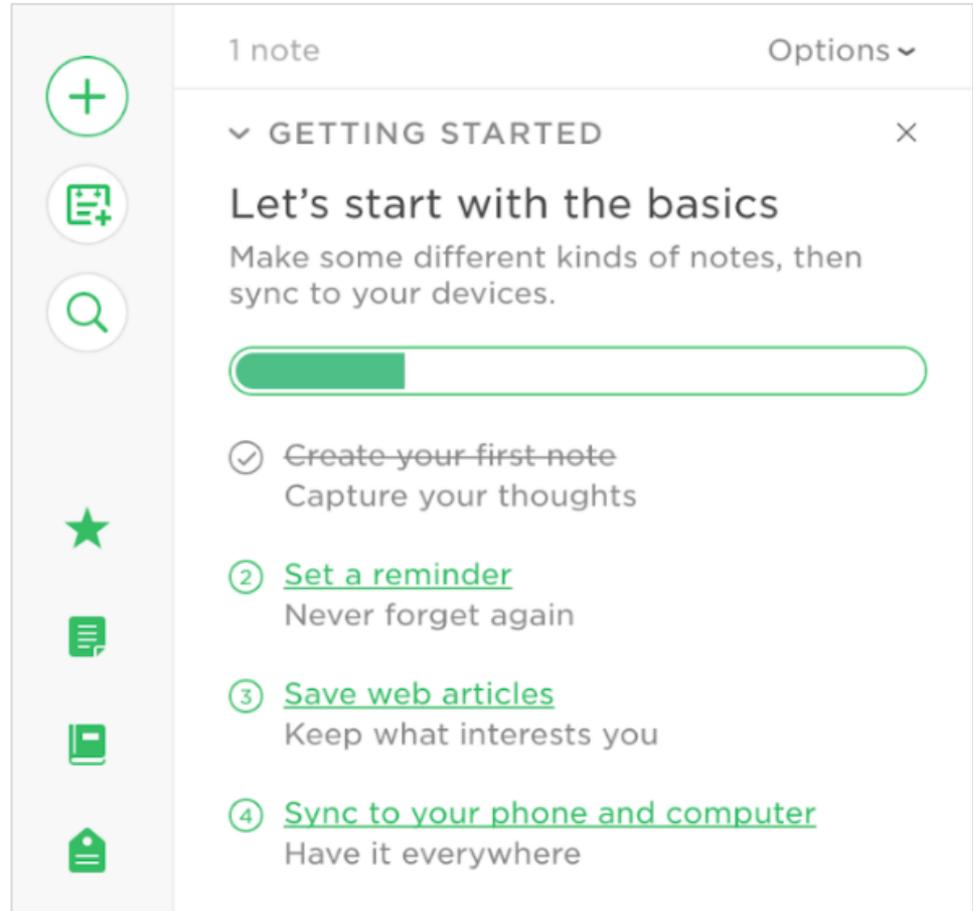
- [Check your claim or appeal status](#)
- [View your payment history](#)
- [Upload evidence to support your claim](#)
- [File for a VA disability increase](#)
- [File a claim for compensation](#)

 **Education**

 **Records**

Checklists

Checklists can be a good way to prompt users to take additional steps or explore additional features.



Bots and “Helpers”

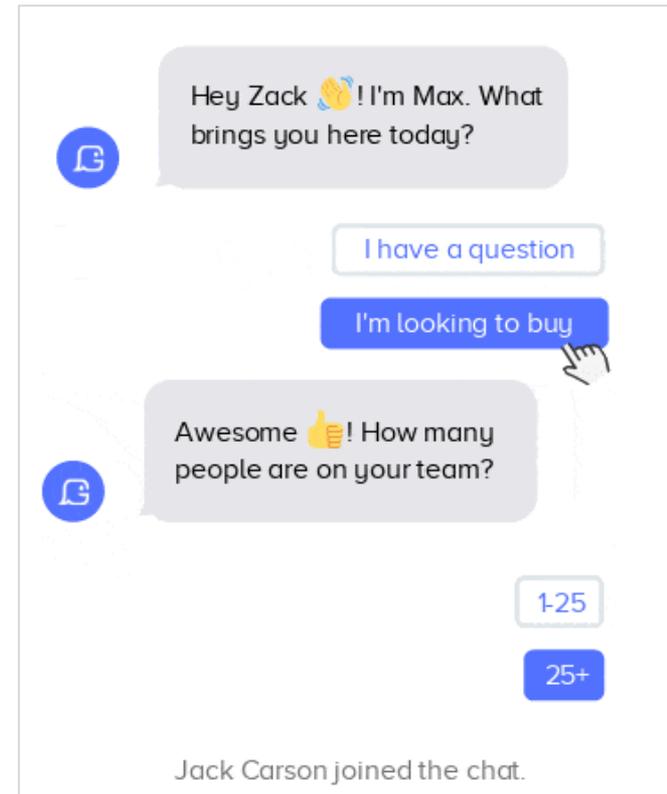
Bots usually serve to help direct users to the right resource within a help center, or to collect more information before passing the user to human support or sales.

It looks like you're writing a letter.

Would you like help?

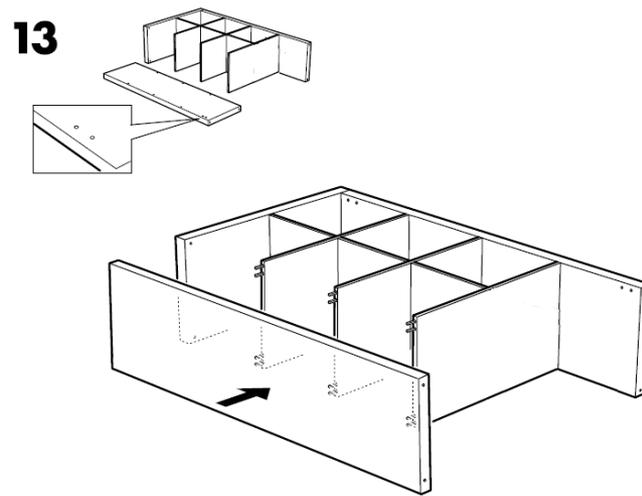
- Get help with writing the letter
- Just type the letter without help

Don't show me this tip again

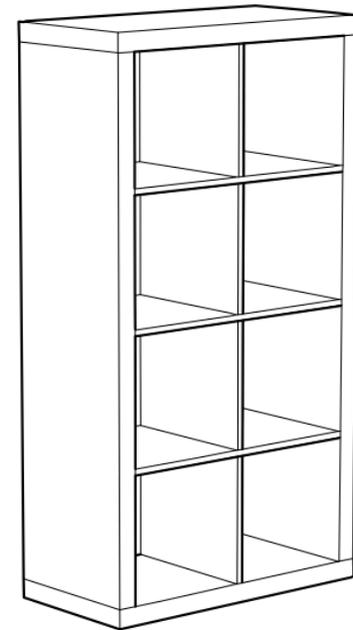


Printed Materials (slide 1 of 2)

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.

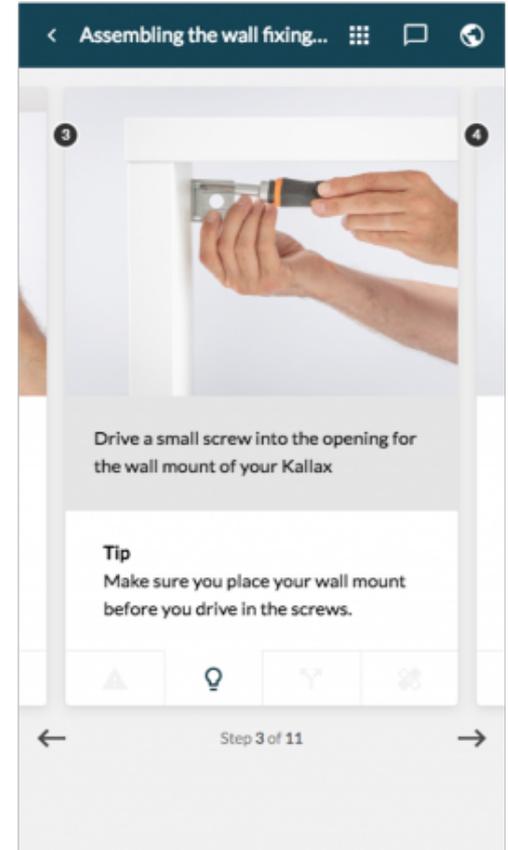
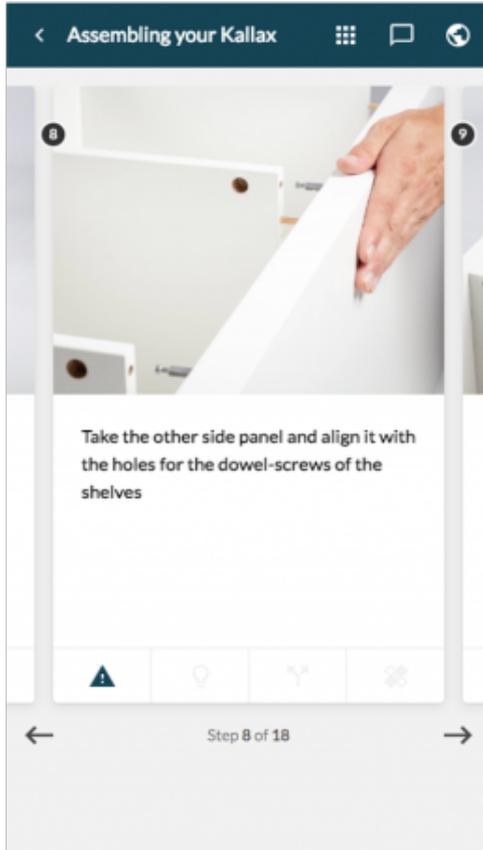
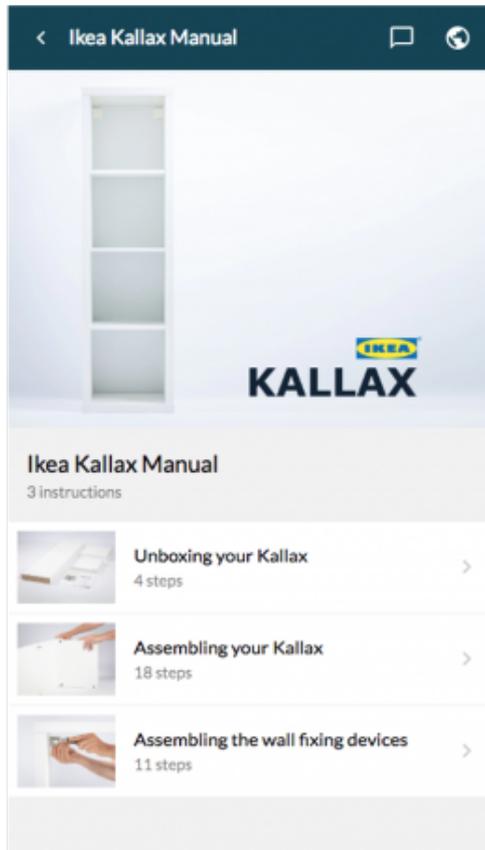


KALLAX



Printed Materials (slide 2 of 2)

(Of course, if your instructions aren't clear, users will look elsewhere.)



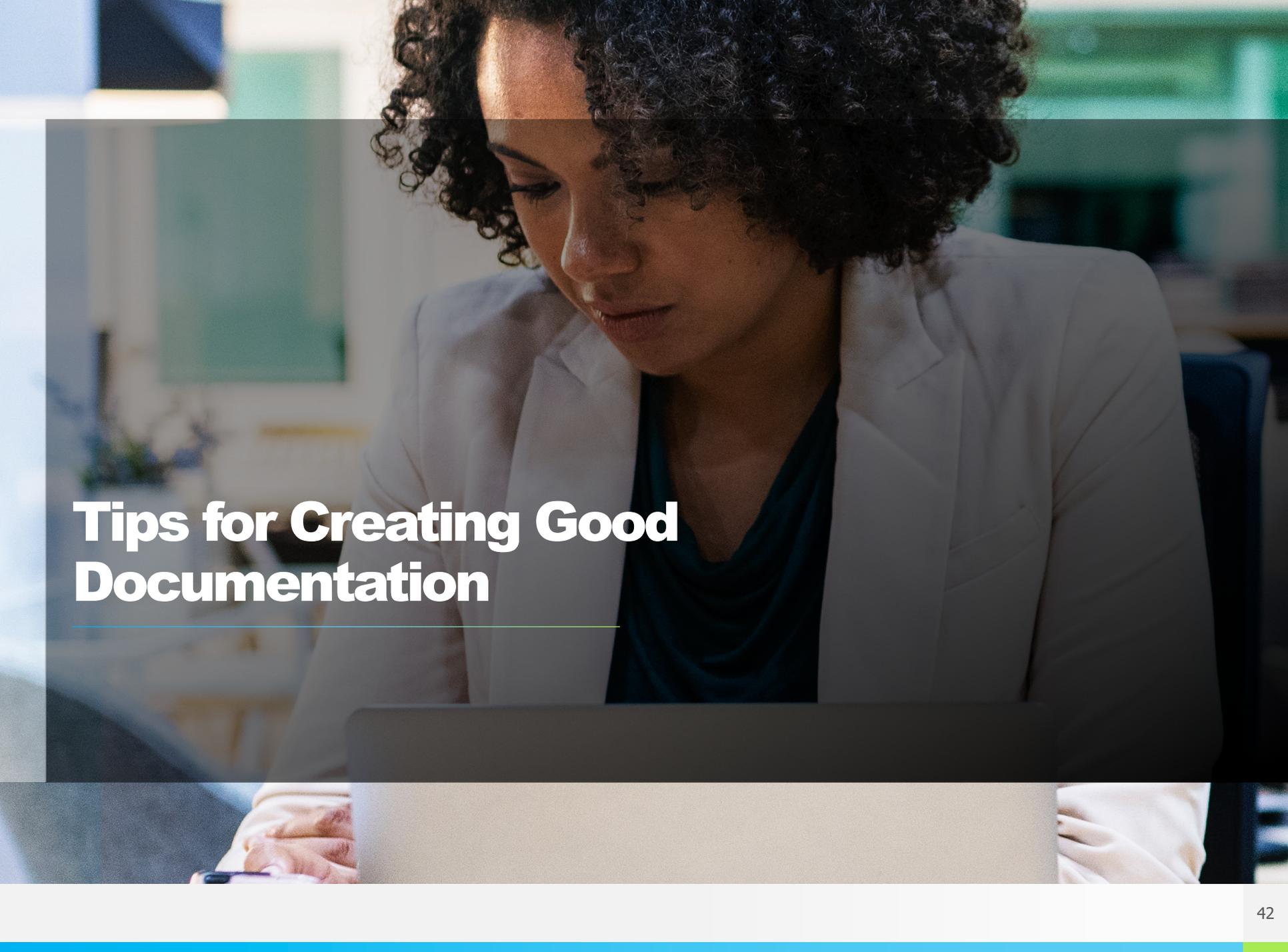
And really, anything else you can imagine.

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 to 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.

Tips for Creating Good Documentation (slide 3 of 5)

**Don't force your users to change their habits.
They won't.**

Tips for Creating Good Documentation (slide 4 of 5)

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**

The infographic is split into two color-coded sections. The left section has a green background and features illustrations of cardboard boxes (one labeled 'CEREAL', one labeled 'PIZZA'), a newspaper, and a stack of books. The right section has a blue background and features illustrations of a metal pot, a coffee can, a wine bottle, a glass bottle, a plastic bottle, a plastic cup, a plastic basket, a yogurt container, and two milk cartons. Labels for each category are placed below the corresponding illustrations.

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



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.



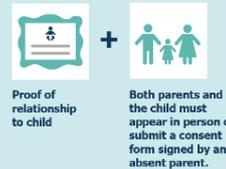
To get a new passport, you must go to a local passport acceptance facility. Some passport acceptance facilities require appointments. Many provide passport photos for a fee.

Passport acceptance facilities can be post offices, libraries, or county courts.

What you'll need to provide



Additional requirements for a child's passport



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 passportappointment.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 / 1-888-874-7793 (TTY/TTD) 24/7

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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](#)
- Behavioral Economics: *Nudge: Improving Decisions About Health, Wealth, and Happiness*, by Richard H. and Cass R. Sunstein
- 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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