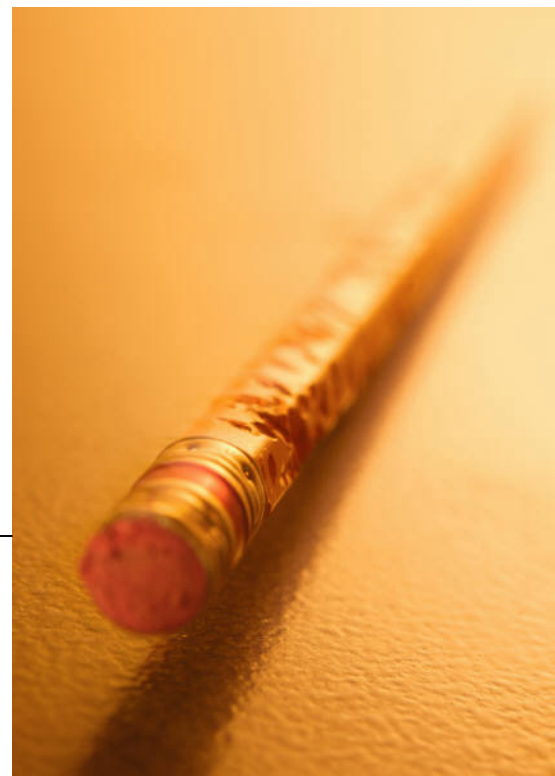# Technical Communication

Think Business Networks

www.thinkbn.com

White Paper

Meenakshi S

Technical Writer

meena@thinkbn.com

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determining usability of an
online
Help Manual

Software applications today have moved farther to the right on the complexity scale. More and more industries and fields are relying on the use of software to speed up their processes and to increase productivity. Granted, computer applications can be the panacea for almost everything in an organization, but how well has the application itself been interpreted by its users?

Enter the Help Manual. The user manual or help system is exclusively designed to help the user understand the application.

The Help Manual serves many purposes:

- To enable the user to set up the system and start working
- To help them trouble-shoot potential problems or hurdles
- To serve as a handy reference while using new or advance features

The manual can be distributed and published over various mediums. The most preferred medium for software, of course, is the online Help. Sometimes, a printed version or a "hard copy" also accompanies the package. The printed version is usually restricted to Installation guides, copyright notices and other legal agreements.

This white paper talks about usability issues in online or digital Help Manuals.

ONLINE HELP: TOOLS AND METHODOLOGIES

An online help manual usually has an explorer-like interface and is divided into two panes: the Navigation pane on the left and the Content pane on the right.

The Navigation pane has many choices that allow you to easily and accurately locate the topic or feature that you need information on.

There are many simple tools to create an online help file. Here's a look at some of the most popular among technical writers.

HTML Help: A Help compiler from Microsoft that is easy to use. It comes bundled with Visual Studio 6.0 and above. A nifty Image Editor is also included; you can use it to easily control and create screen captures.

RoboHelp: Easily a favorite with technical writers because of its collaboration feature, and powerful indexing.

WinHelp: A primitive version of a Help compiler that relies on a text document with footnotes. Limitations exist while including images and hyperlinks.

Apart from these tools, there are many other desktop publishing applications and text editors that are used to create printed manuals.

How indispensable are Help Manuals?

Technical writing, as opposed to creative writing is a highly disciplined arena where the scope for digression and personal opinion is severely limited. A technical manual or a user guide should be succinct and to the point and accomplish the primary goal of educating the user.

It is a common fallacy among the programming community that no one needs a technical manual or documentation of any kind. Documentation is their bête-noire and truth be said, they would go to any lengths to avoid it. Jakob Nielsen, in his User Experience World Tour Seminar in Seattle in 2001, said, "Nobody reads the manuals." (For more on Nielsen, check out his site, www.useit.com). Another interesting read is Geoff Hart's article, "Nobody Reads the Manuals, Do They?"

http://www.raycomm.com/techwhirl/usersadvocate_nobodyreads.html.

Users will not rely on manuals when the application's UI is 100% user-friendly and where guidance is provided very intuitively and in an unobtrusive manner. The possibility of that happening is remote, going by today's usability standards. My all-time favorite for intuitive help is a Windows classic. "Keyboard error or keyboard not found. Press F1 for help". I truly did not believe in its existence until my keyboard cable sprang loose the other day.

Joel Spolsky, founder of FogCreek software says, "When you design user interfaces, it's a good idea to keep two principles in mind:

- Users don't have the manual, and if they did, they wouldn't read it.
- In fact, users can't read anything, and if they could, they wouldn't want to.

Read his full article "Designing for People Who Have Better Things To Do With Their Lives"

Sometimes, manuals are not even taken out from their shrink-wrap, but it is usually the first place that users turn to when they are stumped. Imagine their frustration when they are not able to locate the information they need. 6 out of 10 users do not know what they should be looking for and cannot effectively react to the glut of information that they receive as answers.

That brings us to the important question: how usable should user manuals be?

THE USABILITY FACTOR: A LOOK INTO THE USER'S PSYCHE

There is a very popular gender stereotype that "men never ask for directions". As stereotypes go, the scientific validity of this claim is yet to be established. But, I know for a fact that many users (of software or sandwich makers, for that matter) approach the product with confidence and enthusiasm. They bypass reading the manual and user instructions and start using the system right away. Half the fun lies in exploring the new application and seeing where

each part fits or how every feature works. Why would they bother with reading an (ugh!) user guide? The Help manual pops into their radar screens only when they face a problem or a niggling doubt. According to Spolsky, "Users do just-in-time manual reading, on a strictly need-to-know basis."

When users resort to the help manual, what factors make it usable and friendly?

RELEVANCE:

Understand that the manual is a support tool. When users read a manual or a guide, they are looking for information, not inspiration. Many smart companies make the mistake of adding a pinch of marketing to their technical documents. In many manuals, you can find subtle references to the "Advantages of using Unnamed Product". It irritates the user and leads to the conclusion that the help manual is nothing but a glorified brochure.

Relevant content is the first pre-requisite of any document, more so in the case of a technical manual. When you write a help manual for a telephone, and talk ad nauseam about BSNL's discounts or how you can use the telephone to play music, you are not being relevant at all. Users might be excited by this "great, new feature" but they have to first figure out what the little buttons are for.

LANGUAGE:

So, you have enticed the reader into reading your manual. He is convinced that the soul of the software has been captured between those pages. Now comes the most important part that will sustain his interest: your language.

Technical writing need not be dry as a cracker. Your language should be accurate yet conversational. Watch out for spelling and untoward typos. These ogres of language can kill usability in one single stroke. It may not be a big thing, but when readers trip over misspelled words and inappropriate phrases, they are left with a bitter taste in their mouth.

ACCURACY:

Mission-critical applications or equipment will veer dangerously off-course if there are errors in technical documents. 100% accuracy is essential when you are introducing a system or application to its users. The Help Manual establishes the link between the creator and the user. If the manual is rife with inaccuracies and wrong facts, the application itself might come under fire or will fail to invoke the confidence of the user.

Provide Information, not Inspiration

CONCISE:

Being concise is a virtue that is essential for technical documents. An online Help manual demands even more compression of thoughts and data, due to the premium placed on user attention and digital space.

Many profound thoughts and concepts can be expressed as simply as possible. Consider this: Newton's first law of motion contains 29 words while Einstein's $E=mc^2$ is only 5 characters.

HARNESSING THE UNIQUENESS OF THE ONLINE MEDIUM

A digital Help Manual can either be the more popular "Static" model (using links to electronically turn pages and move between documents) or it can be "Dynamic" (where there are multimedia possibilities). There are a few ground rules for harnessing the full horse-power of the online help manual and to make it more effective and meaningful.

1. Engage the participant
2. Focus on objectives
3. Provide intuitive navigation, where users can explore their own paths, or retrace their steps
4. Anticipate technical difficulties

While writing for an online help manual, it helps to keep in mind the peculiarities that go with the medium. Once these issues are addressed, usability is a simple step away. I will deal with one such factor here: structure.

STRUCTURE

Information needs to be organized and classified according to the functions of the system or the application. Normally, help manuals follow a sort of hierarchical tree. As in any communication scenario, the audience is always important. If they are novices in the subject, it will normally help if the manual is structured distinctly, so that they can learn the structure of the application itself.

If, however, users already have some knowledge in the subject, then they will already have formed their own structure for it. In this case they will consciously or subconsciously know where they expect to find things. If the Help Manual's structure is different from theirs, enforcing it too strongly will confuse them and put them off.

DEMONSTRATING THE EFFECTIVENESS AND VALUE OF HELP PRODUCTS

Precise metrics are hard to come by for a help manual's usability and effectiveness. Usability issues are more subjective and dictated by common sense. There is however, a way to gauge user level of interaction with the contextual help. Saul Carliner prefers to think of this as a Four-Level Process. We can use Kirkpatrick's Four Levels of Evaluation that are used to determine effectiveness of training programs.

Kirkpatrick's Four Levels of Evaluation-
Adapted to a help manual

Level I: Reaction
Assesses user's initial reactions to a manual. This, in turn, offers insights into satisfaction with the document, a perception of value.

Level II: Learning
Assesses the amount of information that users gathered. Authors usually assess this with a criterion-referenced test. The criteria are objectives for the manual: skills that users should gain after reading the manual. Because the objectives are the requirements for the manual, a Level II evaluation assesses conformance to requirements, or quality.
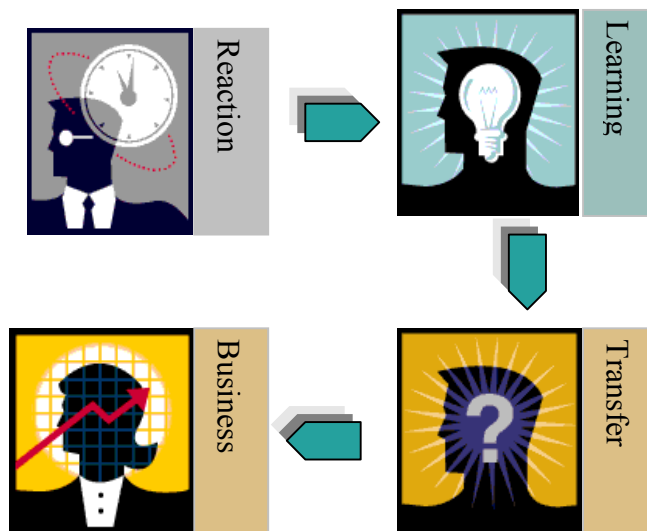
Level III: Transfer
Assesses the amount of material that users actually use in everyday work after reading the manual.

Level IV: Business results
Assesses the financial impact of the help manual on the bottom line of the organization.

Due to its innate similarity, we can adopt this Kirkpatrick's model to assess usability and

effectiveness of help manuals.

For many reasons, Level IV is the most difficult level to measure. First, most manuals do not have explicitly written business objectives, such as "this help manual should reduce support expenses by 20 percent."

Second, the methodology for assessing business impact is not yet refined. Some assess this measurement by tracking business measurements, others assess by observations, some by surveys, and still others assess by qualitative measures.

SUMMARY

Online Help has many advantages over printed manuals, where the user can get instant answers as and when he is working with the application. He need not hunt down misplaced manuals, thumb through never-ending pages and not find the information that he is looking for. Determining usability of an online help manual is a complex exercise of understanding the typical reader's habits and his information gathering practices.

Increasingly user-friendly features like interactivity, context-sensitive help and intuitive guidance are being used in a holistic approach while building the system.

These make for a better application on the whole and enhance user-experience.