

The Future of the User's Guide in the Documentation Set

David K. Farkas

With online help rapidly becoming the central piece in the documentation set, software companies might consider two different directions in their documentation planning. The first is to think of the user's guide as a high-quality supplement to help. The second is to think of the user's guide as a transitional piece that will adequately support users while they make the transition to a largely online documentation set. Each of these directions carries different implications for the design of the user's guide.

INTRODUCTION

What will be the future of the user's guide in the era of online documentation? Should we be writing user's guides at all? If so, what needs should they fulfill and what forms should they take? Here are some scenarios for the documentation set of the future.

THE PREDOMINANCE OF ONLINE DOCUMENTATION

Clearly, online documentation, rather than print, will soon predominate; and within the online documentation set, help will be the central piece. Help systems offer inherent advantages over print. These include rapid electronic access to help information. Also, help systems enable authors to present information at varying levels of detail; for example, a command can be explained briefly, and yet with a single click, the user can display a more detailed explanation. New forms of help such as Microsoft's cue cards and Borland's interactive tutors attempt to monitor user actions and provide "intelligent" assistance. With the emergence of CD-ROM and other forms of high-capacity storage, unlimited color graphics, video, animation, and audio are feasible. Apart from technological advances, we have learned over the last 10 years to write and format documentation so as to address the limitations of the computer screen.

Cost pressures in many segments of the software industry are another factor favoring online documentation. Diskettes and CD-ROMs are cheaper to manufacture, store, and ship than are books. With major software applications selling for \$100 or less, software developers are reluctant to provide thick

volumes that can eat up 10% of product revenue. Finally, online documentation is favored by large

organizations because information can be distributed and maintained on servers, and is favored by users of portable computers because print manuals cannot be readily carried in a briefcase. Print documentation, as we shall see, still has its strengths, but online documentation holds most of the high cards.

Because of the inherent advantages of help, a wise strategy for almost all software developers is to provide a comprehensive, high-quality help system that can fully support the user. Just as there are now users who resist online documentation, there are—and will be many more—users who will want assistance on the screen and want never to reach for a book. A comprehensive, high-quality help system, however, does not dictate eliminating the user's guide; there are several reasonable options to consider. To better understand these options, let's look at the strengths of print documentation.

STRENGTHS OF PRINT DOCUMENTATION

Although display technology continues to improve, good-quality paper and printing provide a better reading surface than the screen. Print, therefore, is desirable when users will engage in extended reading. Second, print allows for much more elaborate formatting than is typically feasible in help. With print, multiple columns, multiple levels of indentation, clusters of moderately small graphics, call-outs, screening, reverse-outs, and other elements of highly refined formatting can be used freely. This is partly because print offers better resolution than the screen and partly because print designers know the dimensions of the reading surface they are giving the user. In contrast, online documentation generally must be designed for screens that differ greatly in size and capabilities, and (particularly in the case of help) must be designed for display in windows that users can size in any way they choose. Third, many users appreciate the physicality and heft of books and are familiar with such print elements as tables of contents, running heads, and page numbers. It should be noted, however, that the physicality of print is beneficial only when the documentation is moderate in size. A single 200-page manual may be a pleasant thing; the physicality of nine 400-page manuals is burdensome.

LONG-TERM PLANNING OF THE DOCUMENTATION SET

In planning an effective documentation set there are numerous constraints. One is limited time and resources. Another is the need to work around existing circumstances. Other than in special situations such as start-up companies, documentation managers, must take account of the large investment in existing documentation, the training and skills of their documentation staff, the expectations of their customers, and other company-specific factors. With these constraints, it is easy to settle for a short-term plan for the next release. What is really needed, however, is a long-term plan for the next five years, a plan that establishes a thoughtful pathway from the present documentation set to the future. It may be useful to think in terms of two directions: (1) the user's guide as a high-quality supplement to help, a permanent piece that will add significant value to the documentation set; and (2) the user's guide as a lower-quality, transitional piece that will be needed until the company has a high-quality, comprehensive help system and until the user base has been converted to help. Below I briefly describe the design options for the user's guide that lie in each of these directions.

THE HIGH-QUALITY, PERMANENT USER'S GUIDE

Here the most relevant design goals are exploiting the inherent strengths of print, controlling costs, and possibly finding a distinct role that minimally duplicates the functions fulfilled by help.

The Comprehensive User's Guide

One option is a user's guide that (like most help systems) is comprehensive in its coverage of all product features. Its benefits are easier reading of extensive amounts of text and more refined formatting. With a comprehensive user's guide those who wish to can avoid help altogether. This option may well be affordable for smaller products that will not require a thick user's guide or for those large products in which comfortable profit margins justify the expense of a thick book. The comprehensive user's guide, however, will be vulnerable to attack by cost-cutters because its role is not distinct from help.

The Partial User's Guide.

This user's guide covers a subset of the product features. Users who care only about basic functionality may stick with this user's guide and may appreciate a subset of the

product's functionality from which advanced features are excluded. Users who want to learn advanced features will need to "graduate" to the help system. A key design requirement is that users will easily comprehend the scope of this manual—the principles by which particular product functions are included or excluded. In this way, the user will always be able to predict whether the manual covers the topic she is currently interested in. As with the comprehensive user's guide, it should be possible to create the partial user's guide, at least in part, from a single base document that will also be used to generate help. But there will be considerable cost in writing and formatting material specifically for print and in manufacturing a book. But this option is more affordable because the manual's partial coverage of the product results in a smaller manual.

The Conceptually Focused User's Guide

A third option is a user's guide that focuses on concepts and strategies and leaves procedures largely to the help system. Here we are exploiting the strength of print in supporting extended reading. A conceptually focused manual, of course, only makes sense for products that need a lot of conceptual explanation. Significantly, many third-party computer books differentiate themselves from standard-issue documentation (both print and online) by focusing on concepts and strategies. Ultimately, the stiffest competitive test for conceptual print documentation will be online documentation in the form of multimedia.

THE LESSER-QUALITY, TRANSITIONAL USER'S GUIDE

To cut down the scope or quality of the user's guide without providing a comprehensive, high-quality help system is to cheat your customer. On the other hand, with a really good help system in place, it is a reasonable strategy to strongly encourage the use of help and to offer less in the way of print documentation. Pursuing this direction, the design goals are providing print documentation of acceptable quality for those who continue to insist on it, reducing the cost of print documentation (to justify the extra investment in help), and avoiding print designs that will compromise the design of the help system.

The "Shrinking" User's Guide

Many existing help systems are "lite"; they not cover all the tasks that can be performed with the product or all the commands, and they do not explain procedures or commands in enough detail to satisfy all user needs. Furthermore, they do not contain much conceptual

information (which in help can readily be included in such forms as "overview" topics). Products with "lite" help systems force users to rely on a comprehensive user's guide, but if a company incrementally increases the scope and depth of its help system, the scope of the user's guide can gradually shrink.

"Dumping" Help into Print

Even when a high-quality help system has been written, many users will still demand a manual. Documentation that has been written and formatted as help can be "spun off" as print documentation, often with relatively little modification. One drawback to this plan is that information that was originally formatted for the screen is being delivered in print and so will not exhibit the kind of highly refined formatting possible in print. Still, print-oriented users will find this kind of documentation adequate. Another drawback is that the company, while saving the costs of writing and formatting for print, still bears the expense of providing a book.

A potentially severe pitfall is to compromise the design of the online documentation in order to facilitate "dumping" to print. It would be unfortunate, for example, to do without pop-up definitions in help because they would not survive the transition to print.

On-demand Printing

Once a good help system exists, a promising option is not to pay for printing and shipping manuals but to allow users to print off their own copies from help. Help systems, for example, should enable users to print off all or else selected portions of the information in book form. The pages should have running heads and page numbers, and there should be some sort of table of contents and, ideally, an index derived from the help system's search keyword list or online index. These on-demand manuals, of course, will still be written and formatted as help and will generally be printed on 8-1/2 x 11 inch paper using a laser printer, and so the quality will not be high. This capability will probably be part of future help applications; in the meantime, companies can provide a "dump" of help on disk for users who wish to print it.

Printed Books on CD-ROM

Software applications and online documentation are growing large enough to strongly encourage distribution and use in the form of CD-ROM. Currently, help designers often face demands to keep help systems below a certain size, partly to reduce the number of disks that need to be shipped but also because users

often resist loading their hard drives with 3 or 4 MB help systems. With massive digital storage, the size of help systems, online tutorials, and other forms of online documentation can grow significantly larger, making possible, full utilization of graphics and multimedia.

In addition, CD-ROM makes possible another form of documentation: taking the files that were used to produce print manuals and displaying "book pages" on the screen. Online books, however, are a problematic, lesser-value solution. Once again, documentation written and formatted on one medium is being delivered on another, and the more elaborate and possibly more text-laden print formatting may not be highly effective online. Furthermore, the many forms of access characteristic of help may not be possible in these online books. On the other hand, the print-oriented user does get documentation that looks like a manual, and the software developer leverages its investment in printed documentation.

CONCLUSION

There are two further options that belong in their own category. One is to provide high-quality print documentation but only for users who will pay for it. In one instance in which virtually all the standard-issue documentation went online, 20% of the company's customers chose to purchase a print manual. The other option is to identify a quality-oriented third-party book publisher who is willing to produce a book about your product and to actively assist this publisher in preparing and selling the book. There are, of course, options for the user's guide other than those discussed here.

Whatever decisions are made, they should be long-term decisions that take the software company from the present to a desirable future state without interim states in which users lack adequate documentation.

David K. Farkas
Associate Professor
Department of Technical Communication
University of Washington FH-40
Seattle, WA 98195
(206) 685-8659 farkas@u.washington.edu

Dave has written extensively on computer documentation and conducts professional seminars on developing help. He is a co-author (with Scott Boggan and Joe Welinske) of Developing Online Help for Windows, Sams Computer Publishing, 1993. He has been active in STC for 18 years.

