

# Usability Principles for Documentation

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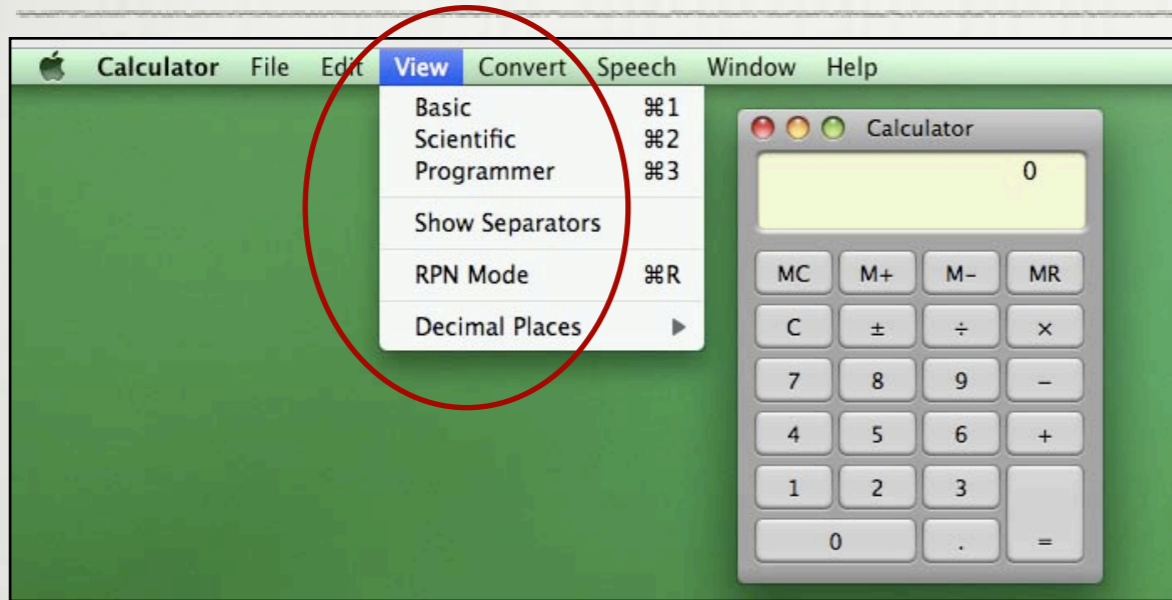
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# Heuristic evaluation

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- Heuristic Evaluation (HE) is a method used to identify usability issues in an interface.
- A set of evaluators examine the interface and judge its compliance with recognized usability principles (the "heuristics") (Source NNG)
- Evaluators are experts in the area of usability and design

# Interfaces

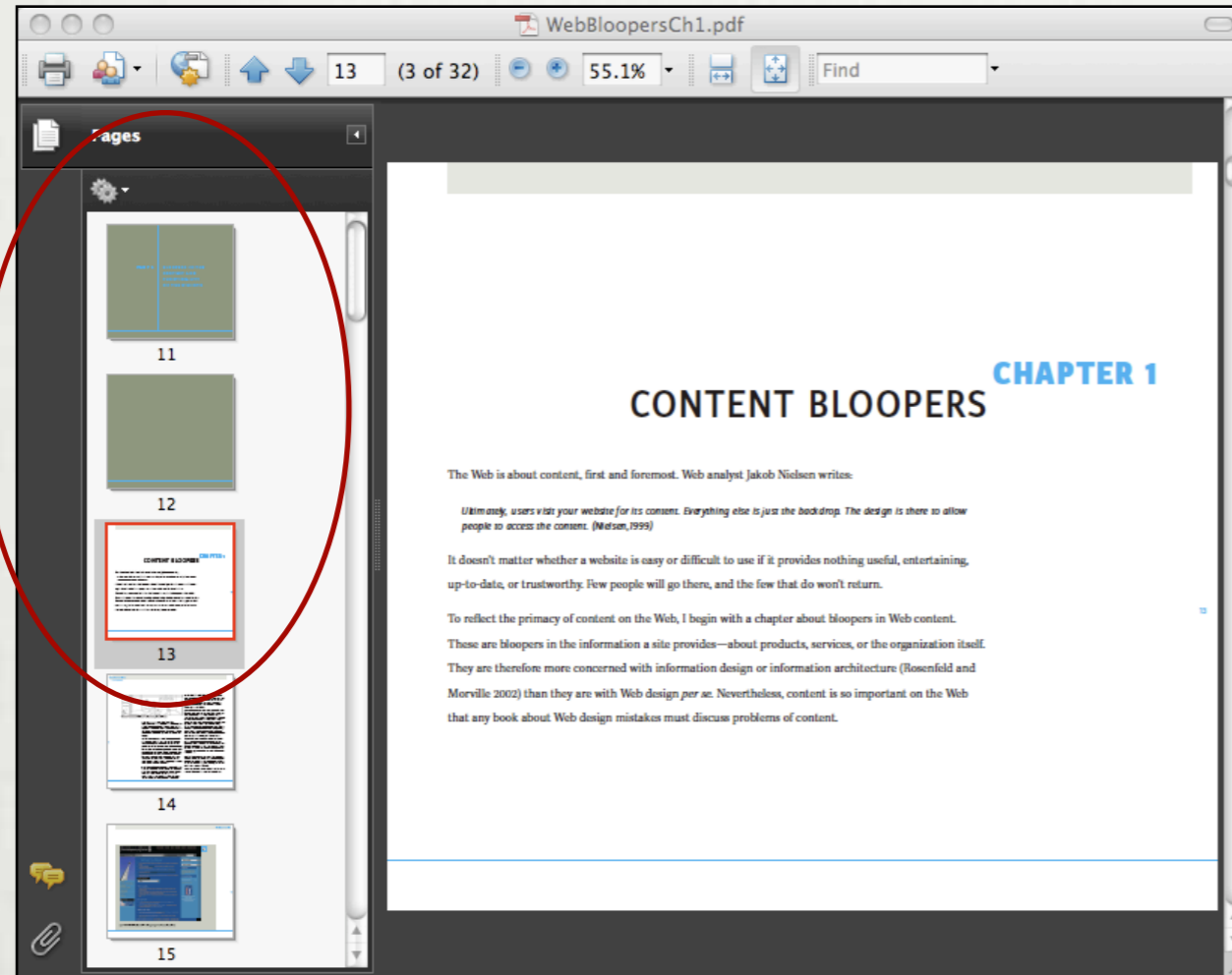


□ application

□ e-comm website



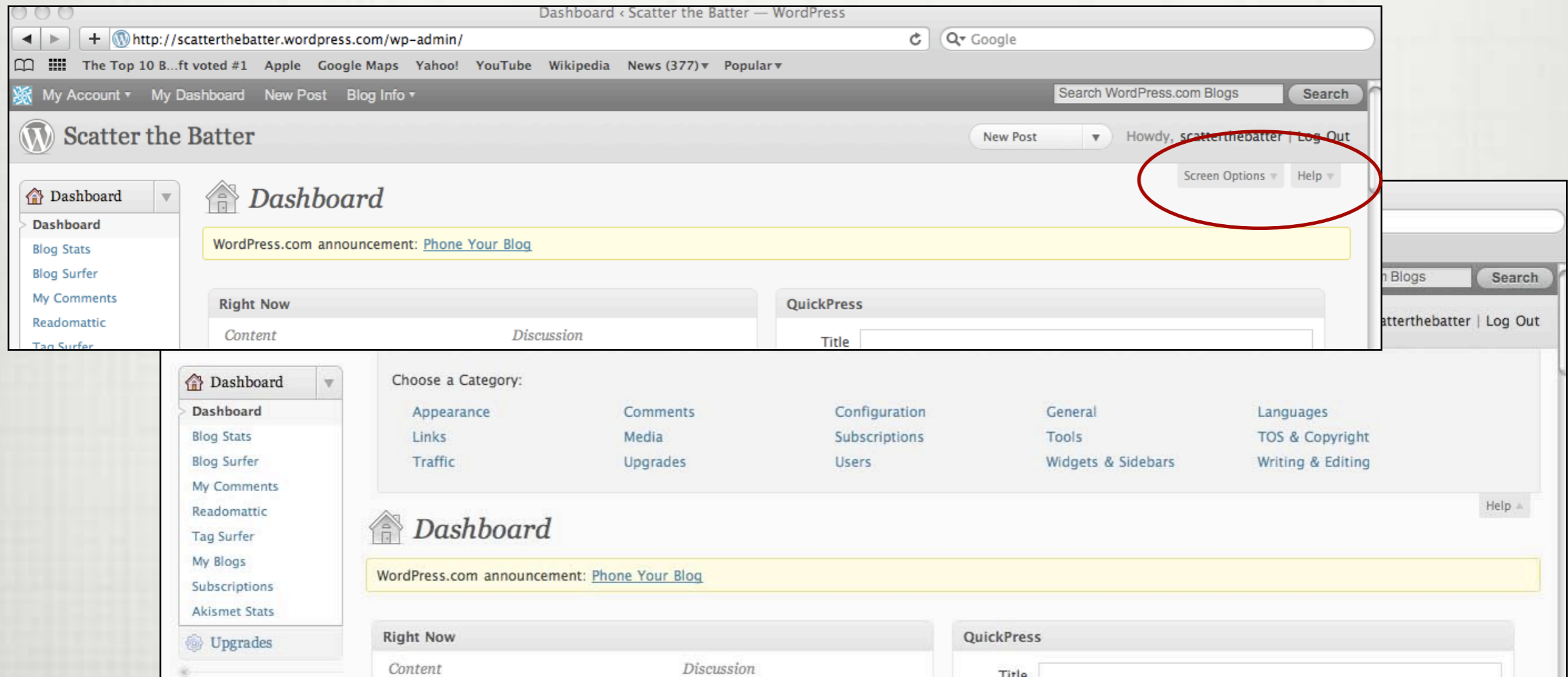
# Interfaces



document

# Interfaces

- embedded help in an interface



# Interfaces



- tutorials/training material

# Interfaces

□ online help

The screenshot shows a Microsoft support article page. At the top, there is a navigation bar with links for 'Support Home', 'Solution Centers', 'Advanced Search', and 'Buy products'. Below this, the article title is 'Troubleshooting guide for Microsoft Online Administrator Center'. A red circle highlights the 'On This Page' button. To the right, there are sections for 'Other Resources' (with dropdowns for 'Other Support Sites', 'Community', and 'Get Help Now'), 'Article Translations' (with a dropdown for 'Arabic'), and 'View related content' (with a list of related articles). The main content area shows the start of the article text and a 'Back to the top' link.

This screenshot shows the 'On This Page' section of the article. A red circle highlights the 'On This Page' button at the top left. The main content is a list of expandable sections: 'INTRODUCTION', 'MORE INFORMATION', and several sub-sections under 'MORE INFORMATION' including 'How to troubleshoot basic issues', 'How to troubleshoot error messages' (with sub-items for 'Error message 1' through '4'), 'How to troubleshoot issues that are related to accessing the MOAC URL', 'How to troubleshoot sign-in issues', 'The screen becomes dark gray except for the window that is currently opened in MOAC', 'Microsoft Online sign-in prompts for credentials when you try to access Microsoft Windows SharePoint Services Web sites from MOAC', and 'Contents such as menus and tables are not displayed in MOAC'. A red circle highlights the 'Expand all | Collapse all' link at the bottom left. On the right, there is a 'View related content' section with a list of related articles and a 'Search related topics' button at the bottom right, also circled in red.

# Content Reviews

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- Peer-to-peer OR technical reviews OR SME reviews focus on quality-checking content and presentation
  - formatting
  - missing information, completeness
  - spellos
  - ordering of information
  - accuracy of content
- Do not check usability issues - usability issues are design-centric, rather than content-centric

# Heuristic Evaluation is...

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- design-oriented evaluation
- rather than
- content quality focused evaluation

# Existing Methods

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- Vesa Purho's heuristics (published in Usability Interface, April 2000)
  - Match between documentation and the real world
  - Match between documentation and the product
  - Purposeful documentation where the intended usage is clear to users
  - Support for different users
  - Effective information design
  - Support for various methods for searching Information
  - Task orientation
  - Troubleshooting
  - Consistency and standards
  - Help on using documentation

# Existing Methods

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- Donn DeBoard's heuristics and questionnaire
  - Effective, Efficient, Engaging, Error tolerant, and Easy to Learn

5) Can you easily switch between the help system and your work using (your software application)?

Very Unsatisfied	_____1	_____2	_____3	_____4	_____5	Very Satisfied
Severity Ranking	_____Low	_____Moderate	_____High			Question is Not Applicable_____

6) Is the help non-intrusive (invoked only when the user requests it)? (The Help should not distract the user's attention from their work before being invoked.)

Very Unsatisfied	_____1	_____2	_____3	_____4	_____5	Very Satisfied
Severity Ranking	_____Low	_____Moderate	_____High			Question is Not Applicable_____

# Donn DeBoard...

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## Efficient

(The speed and accuracy of your work? How quickly did you reach your goals? How quickly was a task completed?)

- 1) Are there various access methods in the help system (Table of Contents, Index, and hyperlinks) that enable you to find information quickly and easily?

Very Unsatisfied \_\_\_\_\_1 \_\_\_\_\_2 \_\_\_\_\_3 \_\_\_\_\_4 \_\_\_\_\_5 Very Satisfied  
Severity Ranking \_\_\_\_\_Low \_\_\_\_\_Moderate \_\_\_\_\_High Question is  
Not  
Applicable\_\_

- 2) Context/Purpose: Does the information in the help system answer why a given task is necessary? (Is it context-specific?)

Very Unsatisfied \_\_\_\_\_1 \_\_\_\_\_2 \_\_\_\_\_3 \_\_\_\_\_4 \_\_\_\_\_5 Very Satisfied  
Severity Ranking \_\_\_\_\_Low \_\_\_\_\_Moderate \_\_\_\_\_High Question is  
Not  
Applicable\_\_

# Donn DeBoard...

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## Error Tolerant

(Does the help system prevent the user from making errors? Is there information on how to recover from errors?)

- 1) Are there cautions and warnings in the help systems that keep you aware and away from trouble using (your software application)?

Very Unsatisfied    \_\_\_\_\_1    \_\_\_\_\_2    \_\_\_\_\_3    \_\_\_\_\_4    \_\_\_\_\_5    Very Satisfied  
Severity Ranking    \_\_\_\_\_Low    \_\_\_\_\_Moderate    \_\_\_\_\_High    Question is  
Not  
Applicable\_\_\_\_\_

- 2) Is there a troubleshooting section of the help system that provides a remedial course of action if something unexpected occurs while using (your software application)?

Very Unsatisfied    \_\_\_\_\_1    \_\_\_\_\_2    \_\_\_\_\_3    \_\_\_\_\_4    \_\_\_\_\_5    Very Satisfied  
Severity Ranking    \_\_\_\_\_Low    \_\_\_\_\_Moderate    \_\_\_\_\_High    Question is  
Not  
Applicable\_\_\_\_\_

# Donn DeBoard...

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## Easy To Learn

(Is the help system predictable? Can anyone use the help system with confidence, given a basic skill set required to use (your software application)?)

- 1) Is the help system navigation consistent with the navigation interface of the (your software application)?

Very Unsatisfied \_\_\_\_\_1 \_\_\_\_\_2 \_\_\_\_\_3 \_\_\_\_\_4 \_\_\_\_\_5 Very Satisfied  
Severity Ranking \_\_\_\_\_Low \_\_\_\_\_Moderate \_\_\_\_\_High Question is  
Not  
Applicable\_\_\_\_

- 2) Is the help system presentation consistent with the presentation interface of (your software application)?

Very Unsatisfied \_\_\_\_\_1 \_\_\_\_\_2 \_\_\_\_\_3 \_\_\_\_\_4 \_\_\_\_\_5 Very Satisfied  
Severity Ranking \_\_\_\_\_Low \_\_\_\_\_Moderate \_\_\_\_\_High Question is  
Not  
Applicable\_\_\_\_

# Developing your method

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- Which heuristics apply?
  - Access the help: example
    - located where the user can find it easily
    - uses appropriate media
    - tells how the Help can be used

# Developing your method

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- Find the information: *example*
  - informs the user of his/her current location in the Help
  - provides different ways to find information - ToC, index, search
  - informs the purpose of sectioned content
  - intuitive names and structure for the content
  - uses same terminology as the product
  - supports experienced and new users

# Developing your method

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- Use the information: example
  - task-based content
  - examples and visual aids
  - user control over how much information to present (experience)
  - use the help along with the product

# Developing your method

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- What method do I use to evaluate content using these heuristics?
  - questionnaire
  - checklist
  - group review
  - rating scale
- Report example

Problem description	Location	Heuristic violated	Severity	Recommendation

# Process

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- Typical process
  - Identify the section/s you want evaluated
  - Brief the evaluators (product context, usage, users, key tasks and goals)
  - Fix a review time
  - Get the evaluation done
  - Apply findings

# Test and apply your method

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- Do a pilot
- Refine your method based on the findings
- Wire it into your documentation process
  - ToC stage
  - 1st / 2nd stage draft completion
  - On the final product

# References

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- <http://www.stcsig.org/usability/>
- [www.boxesandarrows.com](http://www.boxesandarrows.com)
- [www.usability.gov](http://www.usability.gov)
- [www.wqusability.com](http://www.wqusability.com)
- Human Factors for Technical Communicators - Maraiiana Coe

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- Thank you
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