

Sample of a general guide containing writing tips

This guide was written to accompany the “Using RoboHelp HTML” tutorial, which was a tutorial about using RoboHelp HTML to create and maintain online user's guides. A group in the Programming section needed to write and assemble online documentation for a program they were writing (part of an international version of FTIS) of and did not have a technical writer available to them. The people in this group had never written user's guides and help files before. Therefore, I thought it would be useful if I provided them with some tips on the general steps for writing a task-oriented user's guide, in addition to teaching them the software used to create online user's guides.

IDT 2000

Writing a task-oriented user's guide

New York Life

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Writing a Task-Oriented User's Guide

The goal of a manual/user's guide or a help system should be to help users solve problems in the workplace. To accomplish this goal, write the manual/user's guide or help system using task orientation. This is an approach to software documentation that presents information in chronological order based on the user's workplace sequences. The guide is written based on the tasks performed by the user in the software, and organized in a way that matches the order in which the user will perform the tasks.

Task orientation includes how-to, step-by-step, procedures, walk-throughs, and tutorials. This method encourages a user to perform the job successfully, not just to learn a new piece of software.

Construct a task list

A task list is a planning tool that will help you to create a descriptive outline of the program's features. To construct a task list, you analyze the tasks that the users will perform when using the software, and list the tasks in chronological order – the order in which the users will perform the tasks when using the program to perform their job.

When constructing a task list, list the names of the tasks. The steps of the tasks are written later in the process.

Link the tasks with program functions

Each task should be centered around a program function (or more than one). Construct the task list by looking at the structure of the program; the menus, dialog boxes, buttons, etc. These will help you determine the functions that the program performs.

For example, when creating a task list of IDT 2000, start with the initial screen. This is the first screen the users encounter when opening the program, and action must be taken at this point. Therefore, start the task list on this dialog box.

The following tasks can be extracted from the IDT initial dialog box:

- Creating files
- Using the Illustration Manager
- Using the Rate Manager
- Using the Administration Manager

However, this is not necessarily the order in which these tasks should be performed. After an analysis of what each of these modules does, the following order is determined.

1. Using the Administration Manager

This is the first task since the Administration Manager needs to be run the first time a user opens IDT.

2. Using the Illustration Manager

3. Using the Rate Manager

During analysis, it is discovered that the order of items 2 and 3 does not matter, so it is recommended that they are put in the order they appear on the dialog box.

4. Creating files

This is the last task to be performed on this dialog box because the illustration and rate changes need to be made before files are created.

There are additional tasks that are performed within each of these four sections of IDT accessed by the four buttons on the initial dialog box. Access these sections of the software and list the tasks that are performed within these sections.

Categorize the task list

Most tasks have to do with using the software, however, some have to do with installing the software and setting it up.

The following are types of tasks in a task list. They are listed in the order they should appear in the user's guide.

- **Installation tasks** are those that get the software onto the user's system. These tasks are usually placed in a separate section of the user's guide or in a separate Installation Guide.
- **Configuration tasks** are those that set up the software correctly. Configuration refers to setting up the software so it will work in the user's hardware environment.
- **Use tasks** are tasks that put the software to work. These tasks involve use of the software to perform a job. These tasks in this category make up most of the task list and the user's guide.

Once you have categorized the task list, group the tasks within these categories into sections of related tasks. Create an outline of the tasks to help you start to organize the chapters or sections of the user's guide.

For example, in IDT, the four main tasks listed in the **Construct a task list** (page 1) section, can create the four main sections of the user's guide. Each section contains the tasks performed within that section.

There should also be a **Getting Started** or **Introduction** section in a user's guide that provides overview information about the software, such as its purpose and any information the user needs to know before they start to use the program. The Installation and Configuration tasks can be contained in this section.

See **Appendix A** for a proposed outline for the IDT user's guide. This outline is not complete, but it is a place to start.

Define task-oriented headings

When writing names for tasks, use task-oriented headings.

The following are examples of task-oriented headings:

- How to adjust the volume
- Adjusting the volume
- Adjust the volume

DO NOT write task names using program-oriented language, as in the following examples:

- Volume
- Volume Adjustment

Include conceptual information

In addition to tasks the users perform, a user's guide also needs to include conceptual information about the tasks. Some tasks may have information that the user may need to know before or in addition to performing the task.

In order to keep the tasks short and concise, the conceptual information should be placed in a separate section.

In **Appendix A**, you will notice that the **Administration Manager** section has been separated into two main sections: **Key Concepts** and **Procedures**.

In the **Key Concepts** section, include conceptual information needed for the tasks to be performed in the **Administration Manager**. Use headings to keep the subsections in the **Key Concepts** section short.

The **Procedures** section contains the tasks relating to the **Administration Manager**.

Write the tasks/procedures

Once you have organized the tasks into sections, start writing the steps for each task.

Include an introductory paragraph

Each procedure should include a paragraph at the beginning describing the purpose of the procedure. Any restrictions (cautions, notes, warnings) and/or tips should also

be included at the beginning of the procedure. Restrictions may also be listed in the procedure if they relate to specific steps.

Write the steps using "active voice"

Break down the actions of a procedure into their smallest sensible units and write each of the steps using active voice. This means that each step should start with a verb. The following are examples of steps written using active voice:

- Select **Open** from the **File** menu.
- Click the **[New]** function button.

The main portion of the step should consist of one sentence, if possible. If there is any more information to be provided, such as restrictions (cautions, notes, warnings) or tips, place it on the next line below the step or the screen shot, without a number.

See **Appendix B** for an example of how to break up information in a step.

Display the results of the steps

When a step instructs the user to click a button that displays a dialog box, list the name of the dialog box after the main portion of the step. See **Appendix D** for an example.

Break long tasks into subtasks

If you have a task or procedure that is longer than about 12 steps, break the procedure up into sections. See **Appendix C** for an example.

Do not list interface options as steps

Interface options are alternative options for performing a step. For example, there may be more than one way to open a file in a program: you can select **Open** from the **File** menu, or click the **[Open]** button. Present the user with one method as the main portion of the step. On a separate line, present an alternative method of accomplishing the same thing.

See **Appendix D** for an example.

In some cases, you may have to create two separate procedures to describe how to perform a task. This may happen if there are two very different ways of performing the task. See **Appendix E** for an example.

In addition, a task could contain a list of alternative methods for completing a task. See **Appendix F** for an example.

Provide references to conceptual information

Sometimes there may be information in a **Key Concepts** section that relates to a specific procedure or to a specific step within a procedure. If the information relates to the procedure as a whole, put a note at the beginning of the procedure (after the introductory paragraph). If the information relates to a specific step only, put the reference within the step. See **Appendix D** for an example.

Use screen shots

Insert screen shots in the steps of a procedure where appropriate. The screen shots show the user what the software displays as the steps are followed. This allows the user to confirm that they are performing the steps correctly.

A screen shot may be a whole screen, a dialog box, a button, a menu, or a portion of any of these. Show only the portion of the screen needed to guide the user. For online help, keep the size of the screen shots to a minimum so they can be viewed without scrolling.

It is sometimes helpful to use callouts on screen shots to point to a specific area of the software. See **Appendix B** for an example.



Happy Documenting!

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