

Do Users Use a User Guide?

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Speaker background

- Sr. Tech Writer
 - Then: Cadence Design Systems, San Jose
 - Now: Oracle Corporation, Belmont
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Do they...?

- Use a User Guide?
- Reference a Reference Manual?
- Ask a Frequently Asked Question?

So now what about...

Application Notes

Release Alerts

Solutions

Migration Guide

Known Problems & Solutions

Product Notes

Software Rollups

"You got me!" - Customer

Company background

Cadence Design Systems, CA

- Maker of computer design software
- Doc users are engineers and system administrators
- Over 200 manuals, hundreds of support docs, & more

Can customers use our support website?

Customer Support Documents

The screenshot shows the Cadence SourceLink website. At the top is the Cadence logo and a navigation bar with links for SOURCELINK HOME, JAPANESE, SEARCH, SOFTWARE UPDATE, FEEDBACK, and CC. The main content area is divided into several sections: 'My Account' with links for Login and Sign up as a New User; 'Service Requests' with a Login link; 'What's New' with links for SPW Support Changes, K2 Support Addresses, FAQs - ALL, PSD 15.0 Release Alert, New Cadence Platform Names on SourceLink, and Enhancements to Software Download Site. The central 'Welcome to SourceLink' section features a search interface with tabs for 'SEARCH MY PRODUCTS', 'SEARCH ALL', and 'BROWSE ALL'. Below these tabs is a 'Search Within:' dropdown menu with four options: 'All Products', 'All Releases', 'All Document Types', and 'All Document Types' (which is highlighted in blue). To the right of the dropdown is a 'Search for:' text input field. Below that is a 'Matches:' dropdown menu with 'ALL of these words' selected. There is also a link for 'Advanced Search' and a 'Saved Queries' section with a 'Login' link.

Search Within:

All Products

All Releases

All Document Types

All Document Types

Application Notes

Frequently Asked Questions

Installation

Known Problems & Solutions

Product Manuals

Product Notes

Software Rollups

Solutions

Our categories confused

Users of our support website:

- Searched the wrong doc categories
- Couldn't describe the categories
- Avoided using categories, slowing search time

23% of failures in the usability tests were due to category confusion

Titles came from everywhere

- Support created “Solutions”
- Pubs created “Known Problems & Solutions”
- Editors wrote “Frequently Asked Questions”

The Big 18

- Application Note
- Configuration Guide
- Flow Guide
- Frequently Asked Questions
- Glossary
- Hardware & Software Requirements
- Installation Guide
- Known Problems & Solutions
- Licensing Guide
- Migration Guide
- Reference Manual
- Release Alert
- Solutions
- Software Rollup
- Troubleshooting
- Tutorial
- User Guide
- What's New

The sorting exercise

5 support engineers and 5 users were asked to:

- View a set of samples
- Describe each document's purpose
- Group docs as they saw fit
- Name each group
- Comment on anything that surprised them

How did they stack up?

- 8 out of 10 wanted product categories first
- Users grouped more:
 - “User” and “Reference Guide” used interchangeably
 - Did not recognize details writers obsess about



In their own words...

“Preparing the machine to run.” “Use it once.”

Installation & Configuration

“Teaches you how to use the tool.”

Reference & User Guides

“What’s different from one version to next.”

New and Changed Features

“Teach you to answer your own questions.”

Troubleshooting & FAQs

Trying out the categories



Installation & Configuration
New or Changed Features
Reference & User Guides
Troubleshooting & FAQs



- Surveyed 87 users
- Gave them the 18 doc descriptions
- Asked them to match each to a category
- Let them suggest any changes

Results

- Agreement was 70% or greater for 13 categories
- Categories that had less agreement:
 - Known Problems & Solutions
 - Licensing
 - Migration Guide (least agreement)
 - Release Alert
 - Tutorial

Other suggestions?

- Suggested a specific Tutorial category
- Suggested "Release Notes": a known category from the past

How present the categories to users?

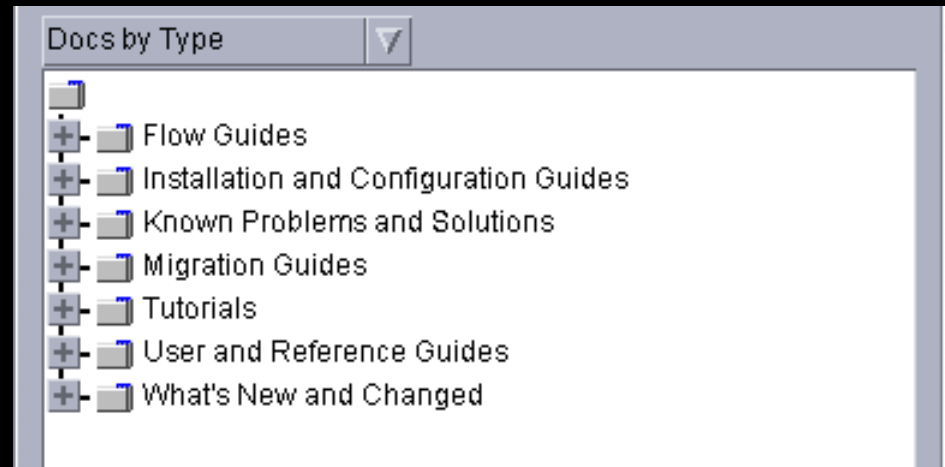
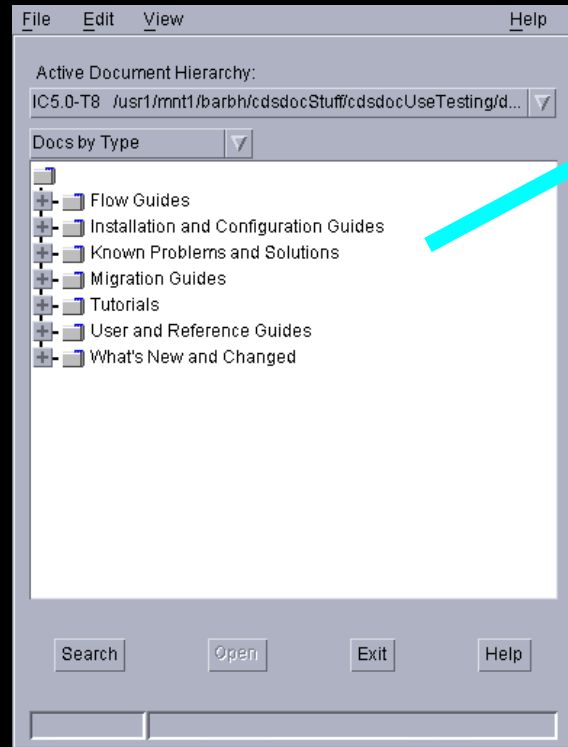
Test! Tried:

- The 4 suggested categories
- The 4 plus 3 additional categories
- All 15 original doc categories*
*3 types were not going into Pubs system
- Put some docs in multiple categories

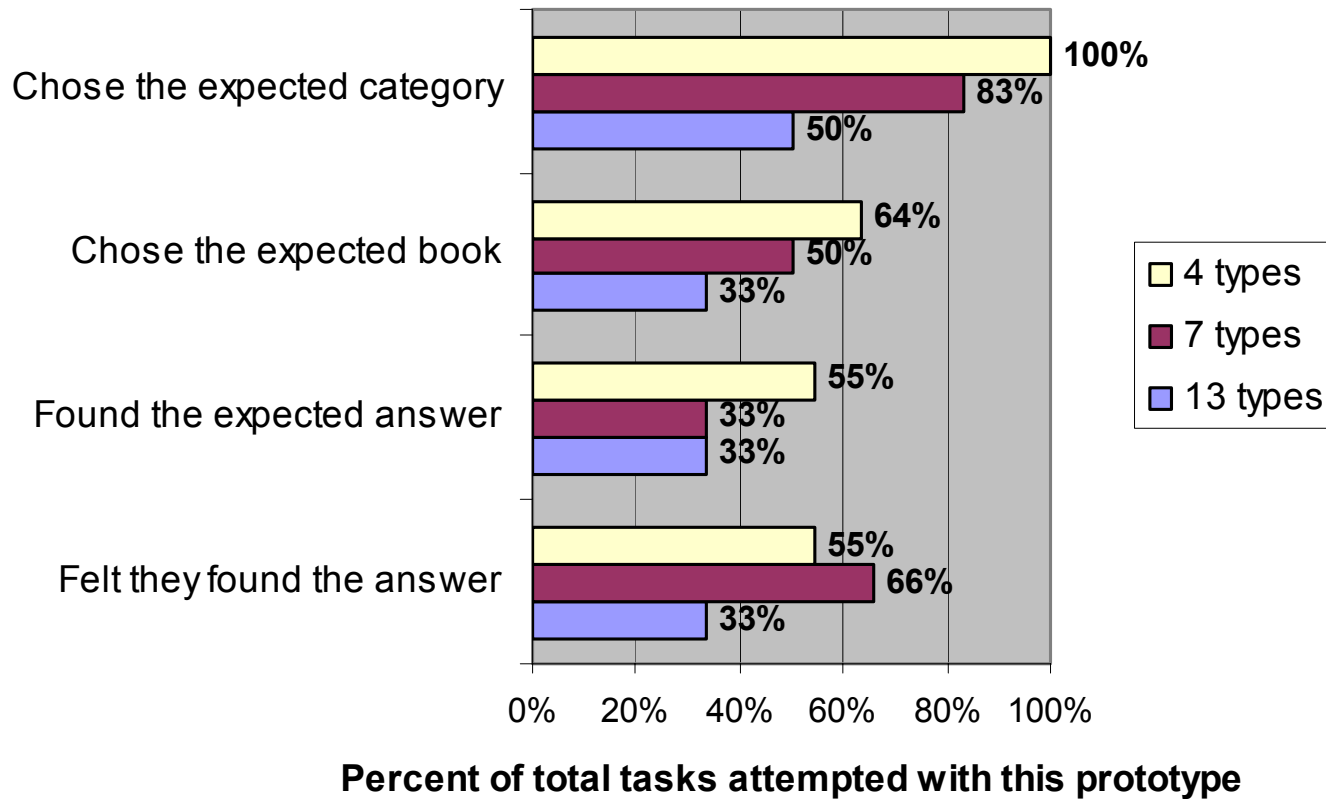
Limitations

- Couldn't include non Pubs types
- Couldn't list products followed by types
- Couldn't add "mouseovers" to type names

Sample interface



How did we do?



What did we learn?

- Too many choices increased failures – but some users still liked them
- Fewer choices increased success – but made some users unsure
- Docs with similar uses needed to be grouped
- Products remained a key criteria
- Document and section titles were important
- User's information type preferences colored responses

What do we suggest?

- Determine users' key criteria
- Determine *their* terminology
 - Their industry standards
 - Any terms you've already taught them
- Consistently structure document titles
- Section titles act as an index
- Provide links from preferred doc types
- Review why you separate information

Parting shots

- “I didn’t even know you had these categories here.”
- “I’ve kind of given up looking where I think I’m going to find things.”
- Browsing docs: “It’s like going into a tropical forest – there is no road.”