



Writing Effective Introductions and Overviews

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In Other WORDS



Session Overview

- The purpose of “chapter 1”
- Key elements of an introduction
- Added value in introductions and overviews
- Q&A



The Purpose of “Chapter 1”

Why bother with an introduction? Does anyone actually read it? How does this enrich the user experience?



Why bother?

1. The introduction is:
 - a) A useless chapter that no one reads
 - b) A general catch-all for info that doesn't seem to fit anywhere else in the manual
 - c) A way of setting the user's expectations for the book
 - d) Important to read if something else isn't clear
2. The only reason I write an intro chapter is:
 - a) Our style guide requires it
 - b) Legal likes all the CYA stuff
 - c) I'm a glutton for punishment
 - d) I think my users find introductions useful
3. I've written:
 - a) No introduction chapters
 - b) A few
 - c) More than you can shake a stick at



Does anyone read an intro?

- A bleak usability view:
 - Joel Spolsky: “Users don’t have the manual, and if they did, they wouldn’t read it”
 - Jakob Nielsen: “Nobody reads the manuals”
 - Geoff Hart: *Nobody Reads Manuals, Do They?*
 - General consensus: even if they read the manual, they sure don’t read the intro blah-blah

- But the good news is that of those who read:
 - 3–7% read the intro right away
 - 10% skim
 - 35% return after problems



The Increased Need for Intros

- Minimalist documentation is problematic:
 - Critical info that cannot be layered gets omitted
 - Someone else makes decisions about what the user needs to (or wants to) know
 - The user's product experience becomes limited
- An intro can address these problems:
 - Provides detail without interfering with minimalist chunking elsewhere in the document
 - Establishes a correct mental model



The Role of an Introduction

- Prepare the user for the document:
 - Set scope, expectations, audience, etc.
 - Explain conventions used, xref to other docs, etc.
- Set the user's mental model:
 - Allow the user to approach the product correctly through high-level overviews
 - Correct common misconceptions
- Save time and effort:
 - Signpost (who needs to read what, when)
 - Provide a high-level view of the document



The Purpose of “Chapter 1”: Review

- Why bother?
- Do users actually read introductions?
- Why does minimalist documentation make a good intro even more critical?
- What are the main roles of a good intro?



Key Elements of an Introduction

A good introduction should contain these elements and answer these basic questions for the user.



Scope

- What does the book cover?
 - Example: installation and configuration
 - Surprise topics (value-added, industry info)
- What isn't covered?
 - Things covered in other parts of the documentation suite
 - *Expected* topics not covered
 - Topics outside the scope of the product documentation
- What is the overall structure of the book?



Scope Example

This *FlexTime Installation Guide* covers all aspects of installation and configuration, including:

- Chapter 1: Determining your site needs
- Chapter 2: Installing the software
- Chapter 3: Creating a user test case
- Chapter 4: Testing the configuration
- Chapter 5: Troubleshooting and fine-tuning

For all other information about running and using FlexTime, see the *FlexTime User Guide*.



Audience

- Do you need to specify the audience?
 - Assuming a certain level of knowledge
 - Different docs for different audiences (for example, end user vs. system administrator)

- Do you support the needs of returning users and new users?
 - Signpost users to the correct chapters
 - If you are using icons to label info for different audiences, identify them here



Audience Example

Thank you for selecting eInvestBot. Our goal at Stock City is to provide powerful and easy-to-use software that gives you effective tools for real-time market monitoring and analysis.

We assume an advanced knowledge of brokerage issues; eInvestBot is not for general users, but an advanced application designed specifically for active traders, investors, and day-traders. Stock City strongly discourages novice investors from using this, or any other stock market software...



Navigation

- Help users access the book:
 - Suggest how to get started
 - Explain who needs to read what
 - Provide a visual “map” of the book

- Make tips and resources available by introducing them:
 - Let users know about glossaries or other resources
 - Help users plan their reading flow to match their work flow



Navigation Example

This reference guide contains info appropriate for administrators and testers. Refer to the following table to see which chapters are most important for you:

Chapter	Sys Admins	Net Admins	Testers & QA
1	✓	✓	✓
2	✓	✓	✓
3	✓	✓	✓
4		✓	
5			✓
6			✓
7	✓		
8	✓		
9		✓	
10	✓		
11		✓	
12			✓
13			✓



Conventions Used

- What do you need to specify?
 - List icons or graphics used to label or identify material
 - Explain unusual or create typography
- What *don't* you need to specify?
 - Common typography (for example, italics for xrefs)
 - Standard-usage terminology
 - Design elements which are intuitive, even if new to the user



Conventions Used Example

Throughout this guide, the following icons appear in the outside margin to assist you:



Keyboard shortcut



Voice-activation feature



Advanced info (algorithms, inside looks, etc.)



Tip for new users



Product Overview

- Create an elevator story for a product.
- Use a top-down approach for increased detail.
 - What, why, how, who, etc.
 - Explain without selling
- List key features without going overboard:
 - From marketing: identify key features that the company wants to push
 - From tech support: identify features that most users really need and use
- Make a decision about the Great Interface Debate.
 - Hardware: can go in Intro
 - Software: after Installation



Product Overview Example

SRS (Standard Rating System) was developed in response to a growing need for a universal employee rating system which could be applied during reviews. Such a rating system would allow government agencies and private industry to use some agreed-upon methodology for assessing employee status and justifying promotions. Having a standard would reduce the number of law suits and nuisance claims, while minimizing the risk of errors in judgment or excessive bias (for or against an employee).

Users of SRS include government program managers, industrial and labor relations practitioners, students considering career training, job seekers, vocational training schools, and employers wishing to set promotion guidelines. It is designed to cover all occupations in which work is performed for pay or profit, reflecting the current occupational structure in the Bahamas.



Theory of Operation

- When do you need this?
 - New technology
 - Existing technology which is misunderstood or misused
 - New version of a product with a bad usability track record

- Techniques:
 - Story or scenario (work flow or application note)
 - Analogy (build on existing knowledge)
 - Comparison (contrast to existing knowledge)
 - Visual explanation (diagram explaining intangible concepts)



Theory of Operation: Story or Scenario Example

Clara was very pleased to get a TuneBug for her birthday! She quickly installed the software onto her desktop PC and searched for music files to put into the music library. She was surprised at how easy it was for her to make MP3 files from her tracks on her music CDs and add them, too, into the library.

After that, Clara created a playlist of her favorite songs, hooked TuneBug up to her computer via the USB connection, and downloaded the music onto it. She couldn't wait to show her friends!

Later that day, Clara's history study group met at Kelly's house to work on their homework. Clara discovered how handy her new TuneBug was when she used it as removable media, copying files from Kelly's computer onto the TuneBug memory card. Once she got home, she connected to her computer and copied the files to her folder...



Theory of Operation: Analogy Example

The Gateway Alert Console works very much like an alarm clock: when you set your alarm clock for 6:30 AM, the alarm goes off when the time reaches 6:30 AM. You can turn the alarm off *without removing the clock from active alarm mode*; in other words, the next morning the alarm will go off again at 6:30 AM.

Similarly, when an event which meets a defined trigger occurs at the gateway, it sets off an action (sound alarm, light alarm, or Alert Report entry). The system administrator acknowledges the alert (that is, “turns off the alarm”), *without removing the console from sentry mode*; in other words, the console continues watching for any of the defined trigger events, and will set off an action the next time one occurs.



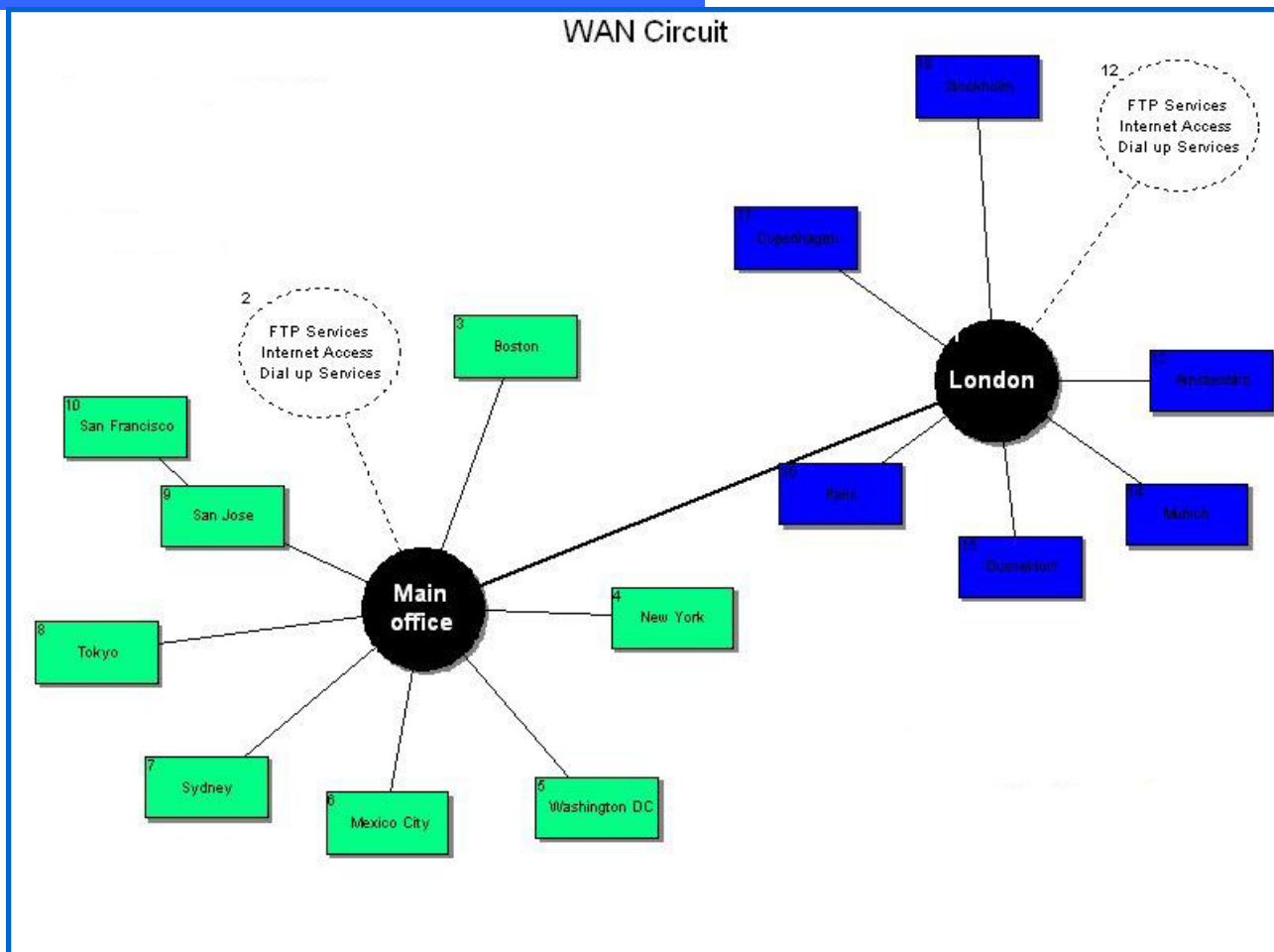
Theory of Operation: Comparison Example

Let's say you want to bake a cake in a conventional oven at 600 degrees F, instead of the usual 350 degrees or so. The outside of the cake will burn before the inside even gets warm. In a conventional oven, the heat has to migrate (by conduction) from the outside of the food toward the middle. You also have dry, hot air on the outside of the food evaporating moisture. So the outside can be crispy and brown (e.g., bread forms a crust) while the inside is moist.

In microwave cooking, the radio waves penetrate the food and excite water and fat molecules pretty much evenly throughout the food. The heat doesn't have to migrate toward the interior; it is everywhere all at once because the molecules are all excited together. In fact, the air in a microwave oven is at room temperature. The whole heating process is different because you are "exciting atoms" rather than "conducting heat."



Theory of Operation: Graphic Example





The Key Elements: Review

- How can establishing the scope of the book save the user time and avoid frustration?
- Why do you need to specify the intended audience?
- What are some examples of conventions used?
- Why is a high-level product overview useful?
- When does it help to include a theory of operation?



Added Value in Introductions

Introductions and overviews can add value to the product.



Facing the Challenge

Writing product overviews can be difficult because:

- Product overviews contain more linear prose.
- The concepts can be more vague.
- Explaining the theory of operation requires more detailed technical knowledge.
- We cannot explain that which we do not understand.



The Frustration Log

- Start a log of all the things you tried to find out in application documentation, but couldn't.
- After you have enough entries, classify them. For example:
 - Missing details about how the system functions (where data is stored, default names, etc.).
 - Technology background lacking (no explanation about the overall field to help you understand).
- Find information parallels in your product and add them to the documentation!



The “What Would I Want?” Test

- Ask yourself what you would want to know about a product.
- Remember your first experience with that product.
- Create a persona and imagine what it wants.



The “Where Does It Go?” Test

- Does all the extra info belong in the intro?
- Determine the appropriate location. For example:
 - Industry glossaries are best kept separate, at the back.
 - Resources and references are expected as appendix chapters.
- Use the intro to reinforce signposting and navigation to those locations.



Added Value: Review

- What's a *frustration log* and how can it help you add value to your intros?
- How can a persona help you identify what users want to know about a product?
- If value-added information belongs elsewhere in the document, why does it still need to be introduced in the intro?



References

- **Examples: Robust Introduction**
 - Try the *Linux Introduction*, at the Linux Forum site (go to www.linuxforum.com, scroll down to Linux Manuals on the left, and click Linux Introduction)
- **Examples: Theory of Operation**
 - See the Bookmark Bridge documentation, at http://bookmarkbridge.sourceforge.net/docs_0.50/theory_of_operation.html
- **Meeting Knowledge Requirements**
 - Everybody's favorite #1: go to www.google.com, type a concept that you want to learn about followed by 'definition' (no quotes needed)
 - Everybody's favorite #2: www.howstuffworks.com
- **Graphics for Overviews**
 - You can get some good ideas from academic books. Try *Advanced Sociology Through Diagrams*, T. Lawson, M. Jones, R. Moores (2000)
 - Create examples abound in hard and soft sciences. Try subjects like epidemiology, physics, or even political science!



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