

Write Your Own User Guide

This is a how-to book that tells everything you need to know about writing a user guide but were afraid to ask. It covers hardware and software, adapting existing materials, conducting usability studies, writing text and preparing illustrations, and printing and binding the finished product. It was published by Peer-To-Peer Communications in February, 1996.

The Text

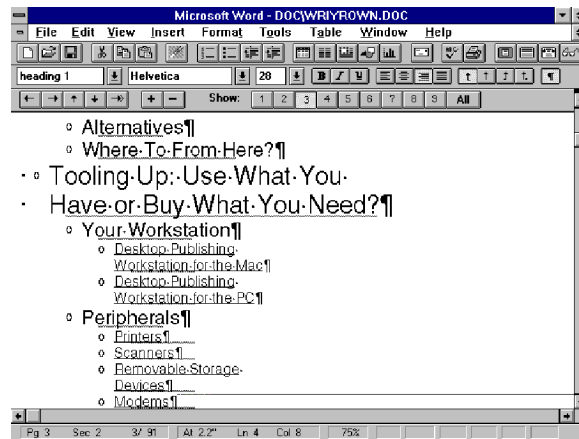
Formats with Style

To give your headings a consistent format, store the formatting information for each level of heading as a *style*. Then, when you create a new heading, it only takes a keystroke or a mouse click to give it the same format as the other headings at that level. And styles are not just for headings. Use styles to create consistent formatting for each type of text in the body of your documents as well.

Once you have a complete user task list in front of you, it's time at last to begin writing the text. But where do you begin? I like to start with a list of major headings, which I break down into sub-headings and continue to sub-divide until they can be divided no further, resulting in the kind of topic outline your English teacher made you hand in along with your junior high compositions. But remember the rules: a heading must be sub-divided into two or more subheadings. A single subdivision cannot stand on its own; either it contains more than one topic, or you have reached the point at which the outline ends and the text writing begins. At that point I begin to flesh out the topics with text, first adding transitional paragraphs that introduce upcoming topics and explain why they are being presented in this order. Transitional paragraphs naturally lead into detailed paragraphs, the meat of the text, and before you know it you've actually written what you set out to write.

Some word processors contain outlining tools that facilitate writing the way I've just described. When you switch from normal display into outlining mode, headings are displayed in stair step fashion, indented according to their level of detail. I like to do my preliminary organizing in this mode, and then switch back and forth between normal display and the outline as I am writing, just to get my bearings and figure out where the paragraph I'm working on fits into the overall plan. Handy features of an outlining facility include

the ability to promote or demote headings to a higher or lower level of detail and the power to move headings along with all their attendant sub-headings and text to different locations in the document, all with one or two keystrokes or mouse clicks.



Typical word processor outline mode display.

(Microsoft Word Outline View screen shot reprinted with permission from Microsoft Corporation.)

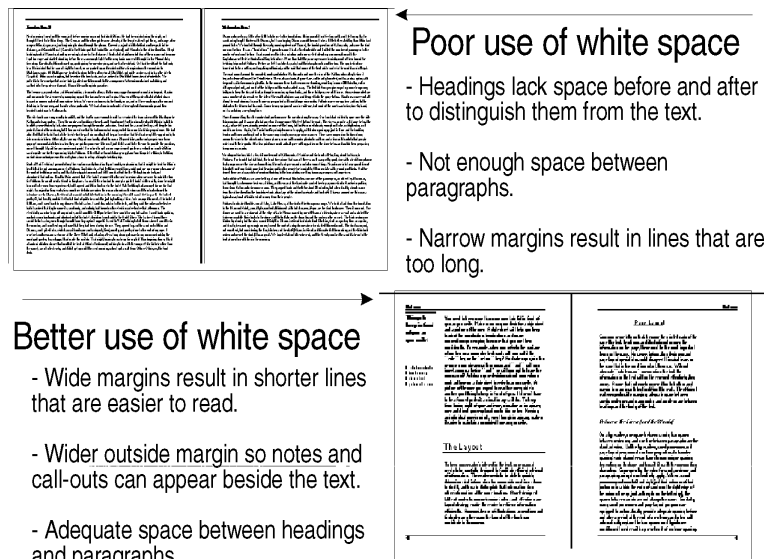
You need to keep more than your user task list in front of you as you write. Make room on your desk for a style sheet and a picture of the user. A style sheet will help you keep track of the punctuation, terminology and usage conventions you employ to ensure that you use them consistently. For example, when you refer to the carriage return key on a computer keyboard, will you call it the “enter” key or the “return” key? And when you join three or more noun phrases with commas and “and,” will you insert a comma before “and,” or will you opt to leave the comma out? Jot down your decisions about conventions such as these on a style sheet to refer to as you write. A picture of the user you expect to read the user guide is another good thing to keep in front of you. It doesn’t have to be a framed portrait: a visual image will do. To keep from losing sight of your audience, visualize an imaginary user and direct your explanations to him or her. Keeping an individual user in mind, even though imaginary, makes it easier to maintain a consistent tone as you write.

The Layout

To keep your reader's interest in the text, your manual needs to be carefully designed to facilitate efficient retrieval of information. The reader needs to be able to quickly determine what information the user guide contains, where to find it, and how to distinguish that information from other information at the same location. A well-designed table of contents, comprehensive index, and effective page layout strategy enable the reader to retrieve information efficiently. Appropriate use of illustrations, appendices and footnotes are other ways the layout of the book can contribute to its success.

Page Layout

Common sense tells us that, because the printed parts of the page (the text, headings, and illustrations) convey the information on the page, these must be the most important items on the page. However, information designers and page layout specialists would disagree: It is what is *not* on the page that is the most important. Without adequate "white space" surrounding the text, they argue, the information in the text will not be received effectively. A page that is densely covered with text is difficult to read. The efficient reader expects wide margins, adequate space between words, sentences and paragraphs, and ample space between headings and the body of the text.



Examples of inadequate and adequate white space.

Between the Lines (and the Words)

On a typewriter, one space between words, two spaces between sentences, and one line between paragraphs are the standard rules. Unlike typewriters, word processors and page layout programs use non-proportional character spacing each character can have its own unique spacing depending on its shape and how it fits with the surrounding characters. Consequently, the rules for word, sentence and paragraph spacing do not entirely apply.

When a word processor produces left and right justified columns of text (columns in which the ends of words on the right edge of the column line up just as they do on the left edge), the spaces between words are not always the same. Similarly, many word processors and page layout programs are equipped to automatically provide adequate spacing before and after a period at the end of a sentence, and often will automatically replace the two spaces most typists are conditioned to enter with a pre-set end-of-sentence spacing. And since word processors have the ability to automatically “wrap” text from one line onto the next line based on the margins settings, the typewriter concepts of a single “carriage return” at the end of each line and two carriage returns at the end of each paragraph do not apply. If you’ve set your margins up correctly, you need only one “carriage return” at the end of each paragraph, and rather than enter two carriage returns at the end of a paragraph, you should be able to specify the inter-paragraph spacing (sometimes called “space before” and/or “space after” in your word processor’s paragraph settings) so that your all paragraphs will automatically be spaced equally. Similarly, you can specify the space before and after headings and figure captions since, to a word processor or page layout program, a heading or caption is simply a one-line paragraph. By using “styles,” you can even assign different spacing for different types of captions, headings or paragraphs.

Most page layout programs and high-end word processors can also modify the space between lines and the space between characters. Printers and typographers call the space between lines “leading” because manual typesetters used strips of lead foil between rows of type to achieve this spacing. The spacing between letters is called “kerning” and I don’t have a clue about the origin of that term.

Loosely kerned characters

Tightly kerned characters

Examples of loose and tight kerning.