

Deliverables: End-user Documentation



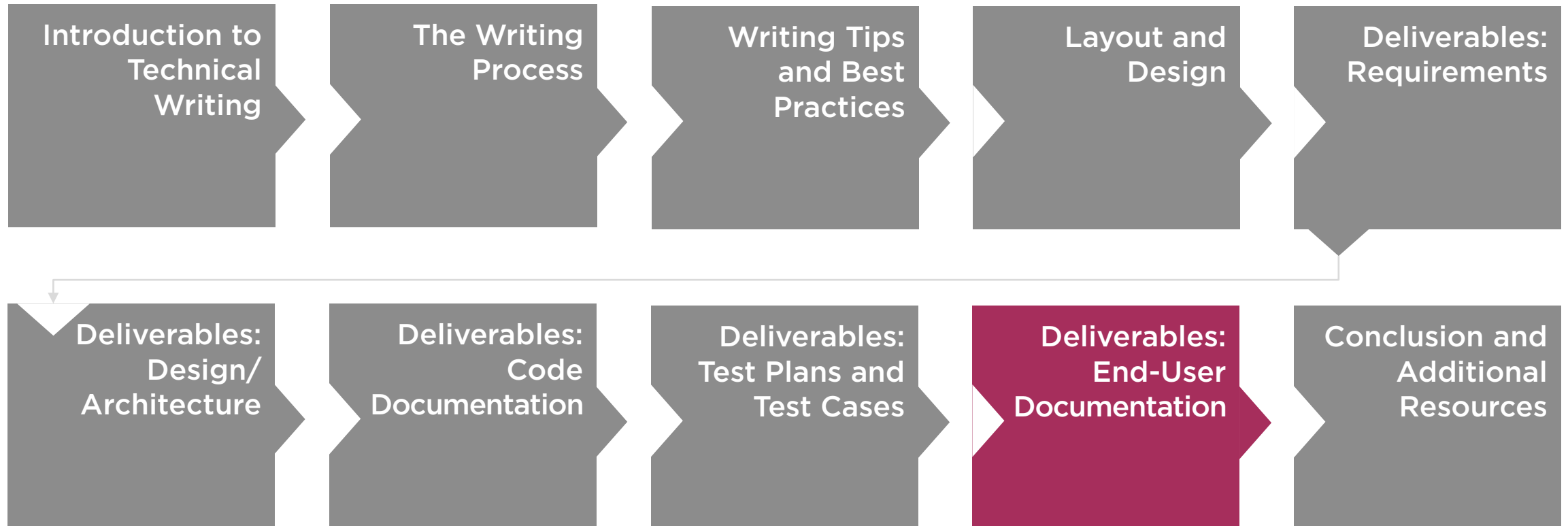
Amber Israelson

DEVELOPER, AUTHOR, TRAINER

www.amberisraelson.com



Course Outline





We're almost done!



Excellent!

A cartoon illustration of a woman with brown hair and glasses, wearing a black blazer over a white shirt and a black skirt with a red waistband. She is standing in an office environment, gesturing with her right hand. In the background, there is a desk with a laptop, a water bottle, and a glass of water. A speech bubble above her head contains the word 'Excellent!'.

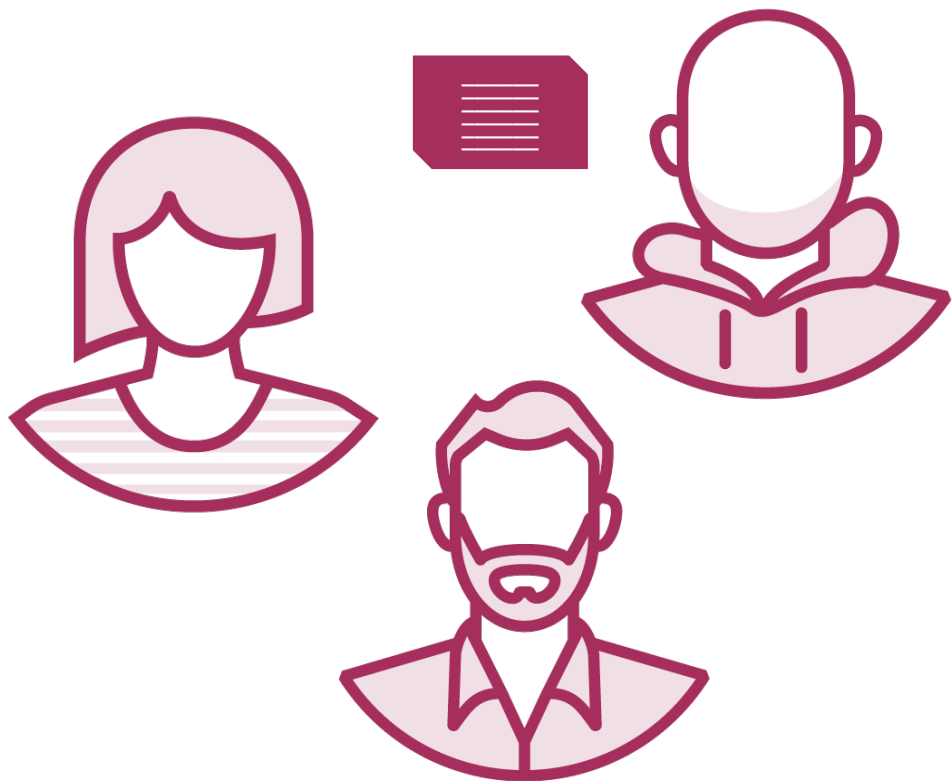
Though I would say the end-user documentation is probably one of the most important parts of the documentation process.



A cartoon illustration of a woman with brown hair and glasses, wearing a black blazer over a white shirt and a black skirt with a red waistband. She is standing and pointing her right hand towards a speech bubble. The background is a stylized, grey-toned office environment with desks, chairs, and a city skyline visible through a window.

If users can't use the software,
the whole development effort
is kind of a waste.

Done! Here you go!



Developers



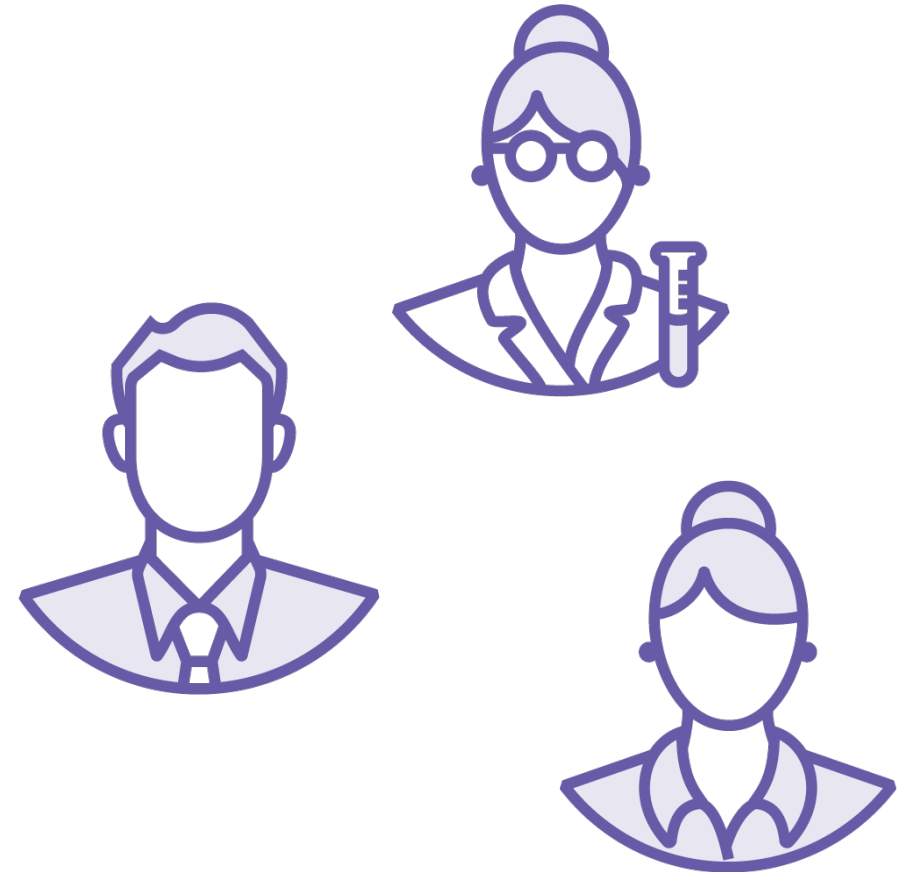
Testers



Done! Here you go!

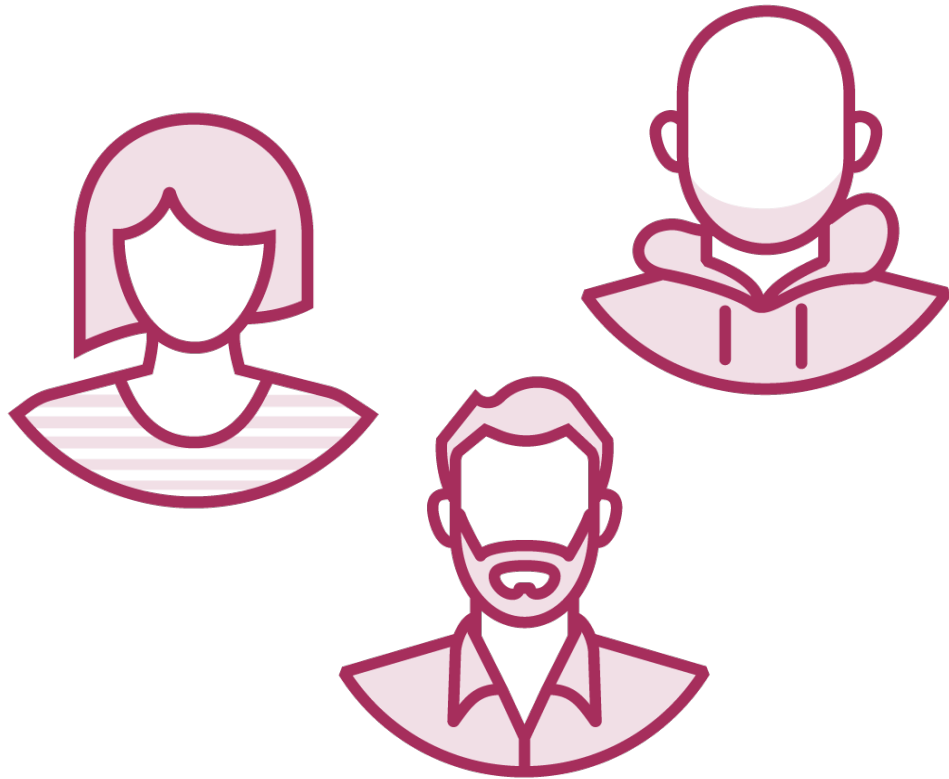


Project Team

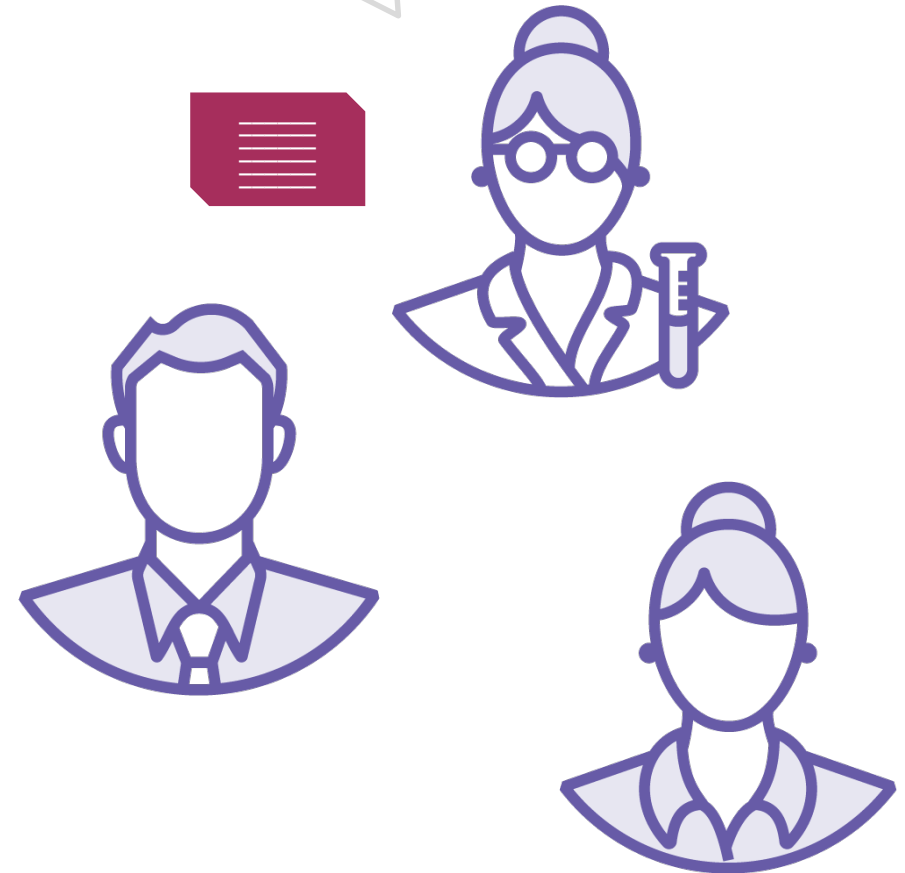


End Users



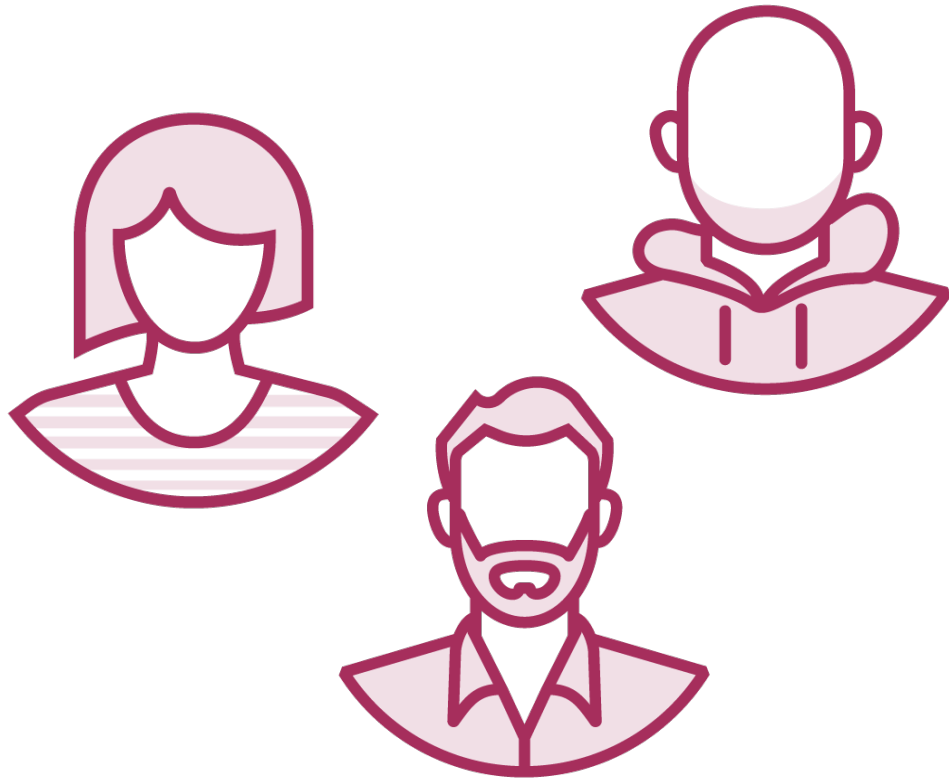


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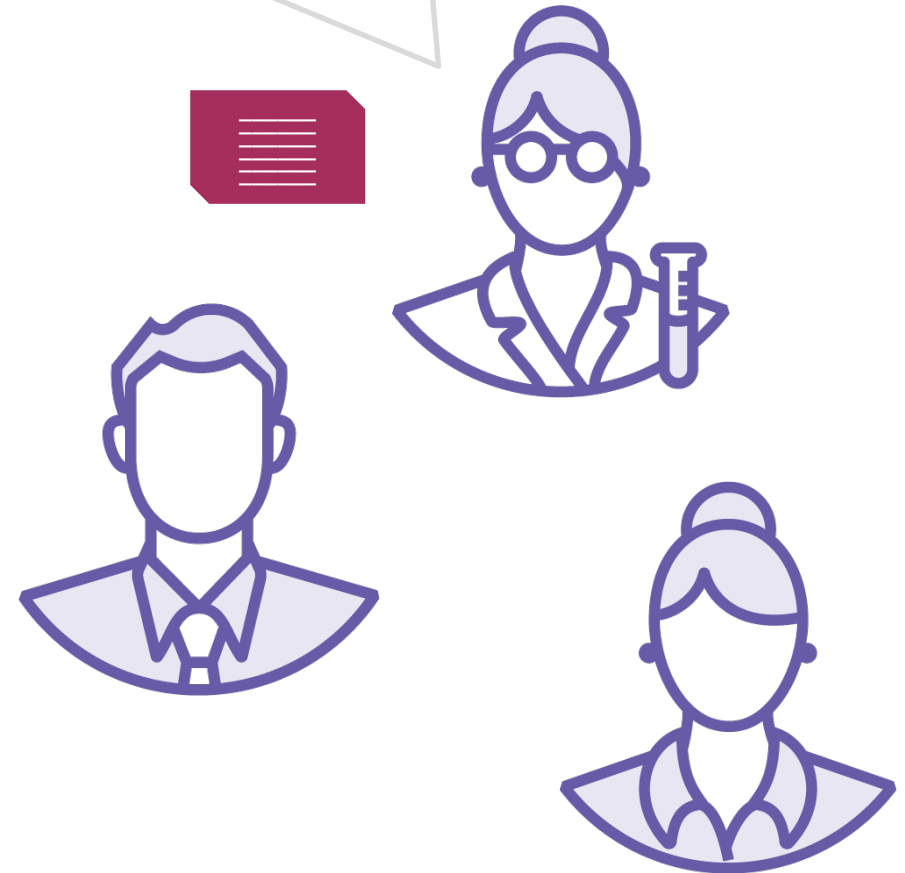


End Users





Project Team



We won't accept this until we get good documentation to go with it.

End Users



“But if it’s intuitive, we don’t need documentation, right?”



It depends...



...on the audience...




...and the scope and
purpose of the software



But for this module, we're going to assume you need end-user documentation



A woman with brown hair and glasses, wearing a black blazer over a white shirt and a black skirt with a red waistband, stands in an office. She is gesturing with her right hand towards a speech bubble. The background shows a desk with a water bottle, a glass, and some papers, and a city skyline through a window.

We'll talk about
three kinds of
documents.

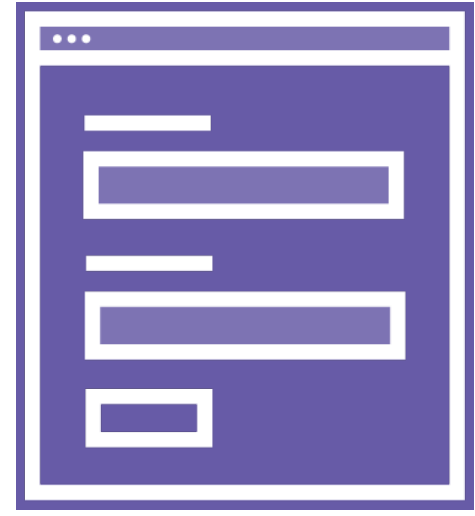
Three Types of End-User Documentation



User Guides



**Quick Reference
Guides**



Release Notes

Three Types of End-User Documentation



User Guides



**Quick Reference
Guides**



Release Notes

User Guide

Helps the end user understand and use a system



Who's the Audience?

It varies greatly





What does it do?



What are the major features?



Why should I use it?



How do I use it?

A man with a beard is sitting at a wooden desk, looking at a tablet. The tablet screen shows a webpage with a video player and text. A white speech bubble is overlaid on the image, containing the text "How does this fit with other systems I'm already using?". To the right of the tablet is a white cup of coffee on a saucer. The background is slightly blurred, showing a desk with papers and a small wooden block.

How does this fit with other systems I'm already using?

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- Setup and configuration information
- Prerequisites for using the system
- Task-based so that the user can start using the system quickly

Tutorials

- Organized by main features or tasks

Troubleshooting

- Detail possible errors or problems and describe how to resolve them

Frequently Asked Questions (FAQs)

- Common questions that user have, along with answers and references to additional information

Support

- How to get additional help
- Contact information

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- Very important for User Guides
- Helps users focus on specific needs

FAQs (FAQs)

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- Common questions that users have, along with answers

“The Pharmalantalert Pharmacist Portal allows pharmacists to create prescriptions and enroll patients in a notification program from a single interface. Patients enrolled in the program will be notified by SMS message when their prescription is ready to pick up.”

Documentation for patients can be found in the Pharmalantalert Patient App User Guide.”



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“The Pharmalantalert Pharmacist Portal is supported on the following browsers:

- **Microsoft Edge v25 or newer**
- **Internet Explorer v10 or newer**
- **Google Chrome v50 or newer**
- **Mozilla Firefox v26 or newer”**

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- “ • **Register for a new account**
• **Log in to your account**
• **Create a new prescription** ”



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“

- **Account**
 - Register for a new account
 - Log in to the system
 - Reset your password
- **Patients**
 - Add a new patient
 - Edit a patient's information
- **Prescriptions**
 - Create a single prescription
 - Create multiple prescriptions
- **Notifications**
 - Enroll a patient in the notification program

”



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- **Provide a brief introduction to the task**
- **Include context for how it lives in and relates to the overall system**
- **Begin each step with a present-tense verb**
- **Number steps chronologically, with one action per step**
- **Include screenshots**
- **Describe objects (page names, field names, etc.) exactly as they appear in the software**



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SMS and MMS Marketing Notifications

Ready to implement SMS and MMS marketing notifications? Here's how it works at a high level:

1. A user you'd like to reach sends an SMS text message to a Twilio phone number you advertise in print, online, or in TV advertising.
2. Your application confirms that the user wants to receive SMS and MMS notifications from your application.
3. An administrator or marketing campaign manager uses a web form to craft a message that will go out to all subscribers via SMS/MMS message.

Building Blocks

To get this done, you'll be working with the following Twilio APIs:

- **Twiml** and the **<Message> Verb**: We'll use Twiml to manage interactions initiated by the user via SMS.
- **Messages Resource**: We will use the REST API to broadcast messages out to all subscribers.

Let's get started! Click the right arrow to move on to the next step of the tutorial.



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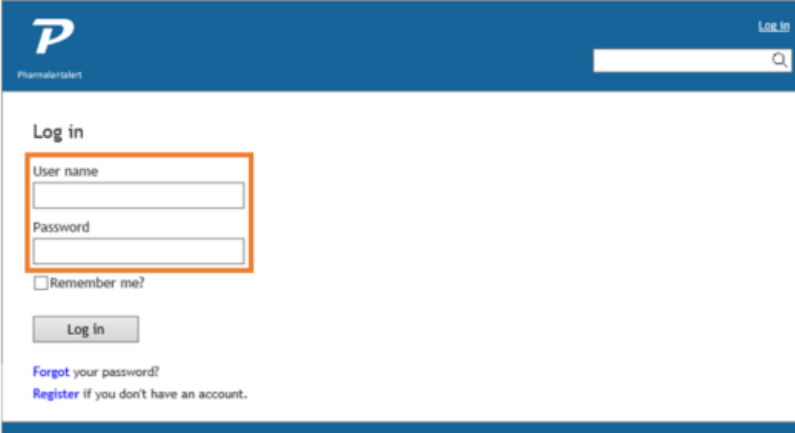
Troubleshooting

- Detail possible errors or problems and describe how to resolve them

Log in to the System

To access the Pharmalantalert Pharmacist Portal functionality, you must first log in to the system using valid credentials.

1. Open a browser
2. Navigate to <http://www.pharmalantalert.com>
3. Enter your credentials
 - 3.1. In the **User name** textbox, enter the user name you were given when you registered for an account
 - 3.2. In the **Password** textbox, enter your password



The screenshot shows the Pharmalantalert login interface. At the top is a blue header with the 'P' logo and 'Pharmalantalert' text. A search bar with a magnifying glass icon is in the top right. Below the header, the 'Log in' section contains two text input fields: 'User name' and 'Password'. The 'User name' field is highlighted with an orange border. Below these fields is a checkbox labeled 'Remember me?'. A 'Log in' button is positioned below the checkbox. At the bottom of the login section, there are two links: 'Forgot your password?' and 'Register if you don't have an account.'.



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Are you with me?

A cartoon illustration of a man with dark hair, wearing black-rimmed glasses, a yellow shirt, and a brown argyle sweater vest. He is smiling broadly and giving a thumbs-up with his right hand. The background is a grayscale office scene with a desk, two chairs, a water bottle, a glass, a cup, and papers. A speech bubble points from the man to the text.

Absolutely!

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“

Logging in

- **Ensure you have registered for an account**
- **Check user name and password for proper casing**
- **If you have forgotten your password, click “Forgot your password”**

”



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- Have the team brainstorm questions for the initial release
- Update FAQs in future releases based on questions and feedback from users

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“

Q: How do I reset my password?

A: Navigate to the login page and click “Forgot your password”

”

How it fits with other products

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“For additional questions or technical support, contact support@pharmalantalert.com”

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Did you get
all that?

A cartoon illustration of a man with dark hair and glasses, wearing a brown vest over a yellow shirt. He is giving a thumbs up with a spiral on his thumb. In the background, there is a grey office desk with a chair, a water bottle, a glass, a cup, and some papers. A speech bubble above the desk says "Got it!".

Got it!



Good!

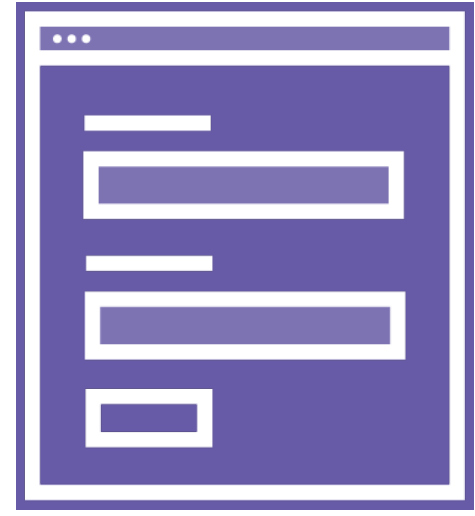
Three Types of End-User Documentation



User Guides

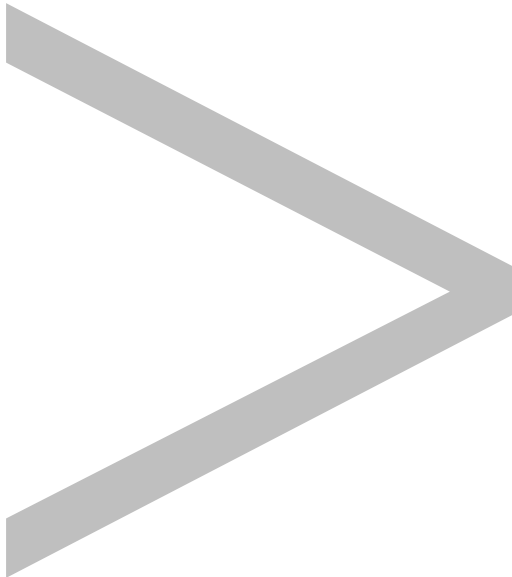


Quick Reference
Guides



Release Notes

User Guide



Quick Reference Guide



Pharmalantalert Quick Reference

- 1 Create an account

- 2 Log in to the system

- 3 Add a new patient

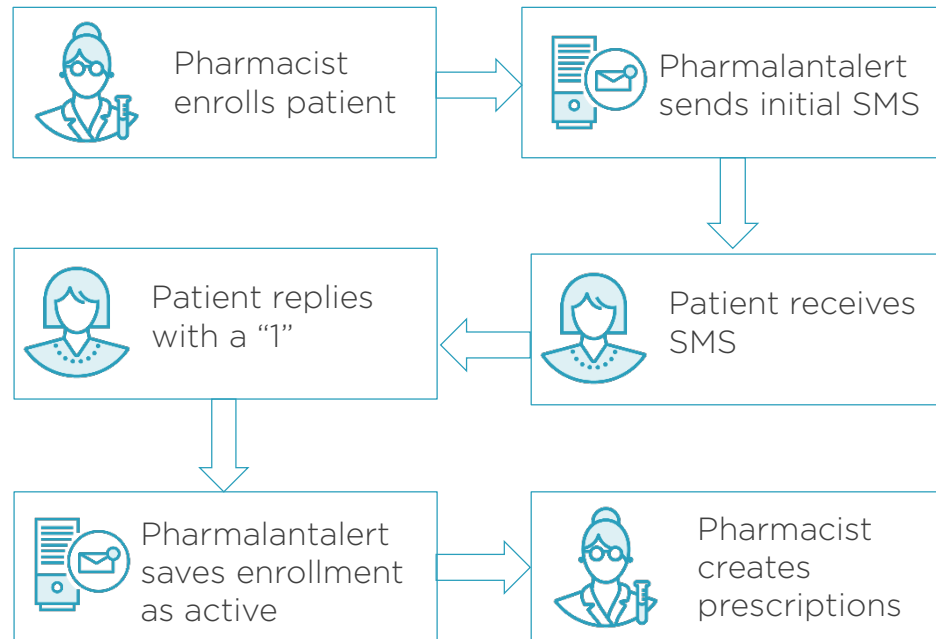
- 4 Create a new prescription

- 5 Enroll patient in notifications



Pharmalantalert Quick Reference

Enrollment Process



Useful Elements for Quick Reference Guides

Diagrams

Reference tables

Steps

Graphics/infographics



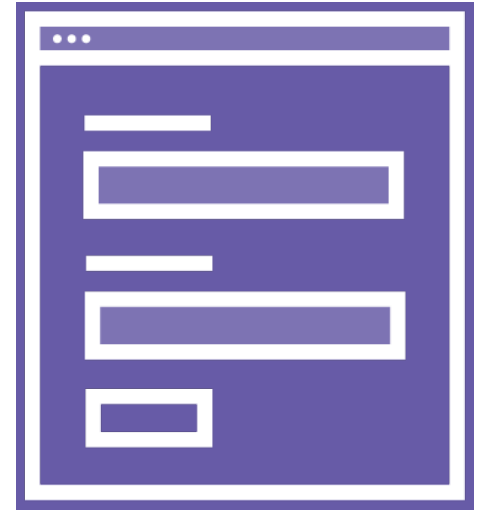
Three Types of End-User Documentation



User Guides



Quick Reference
Guides



Release Notes

Release Notes

Documents the differences between two versions of the same software (e.g., v1 and v2)



Who's the Audience?

Existing users

Sales and marketing





What are the benefits of upgrading?



Did they fix that pesky bug
we've been dealing with?

A woman with long blonde hair is sitting at a wooden table, writing in a spiral notebook with a black pen. She is wearing a blue shirt and a watch. To her left is a white mug on a saucer. In the foreground, a laptop is partially visible. The background is slightly blurred, showing a bright window and some office equipment. A speech bubble is overlaid on the image, containing the text: "What cool new features can we promote and sell?".

What cool new features
can we promote and sell?

Release date

Product version

Previous product version

New Features

- List any net new features or functionality in this release
- What are the benefits of the new feature?

Enhancements

- List changes to existing features
- What is the justification for the change?
- How is the change beneficial?

Resolved Issues

- Detail any problems that existed in the previous release that were fixed in this release
- Include the solution to the issue

Known Issues

- List any bugs that are known to exist when the software releases

Frequently Asked Questions (FAQs)

- Common or anticipated user questions and their answers

Optional (usually only if changed since previous release)

- System requirements
- Installation instructions



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Examples

- Change to the way a feature works
- A page was removed from the product
- Modifications were made to increase performance

FAQs (FAQs)

user questions

anged since

- System requirements
- Installation instructions



Release date

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Examples

- **Feature did not work as designed**
- **Broken links**
- **Performance issues**

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ons



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Release
Product
Previous

New F

- List
- thi
- Wh

- Don't hide issues
- Let the client determine if they will be an issue for them
- Establish credibility
- Make sure they become "Resolved Issues" in the subsequent release

Enhancements

- List changes to existing features
- What is the justification for the change?
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- List any bugs that are known to exist when the software releases

Frequently Asked Questions (FAQs)

- Common or anticipated user questions and their answers

Optional (usually only if changed since previous release)

- System requirements
- Installation instructions



Release date

Product version

Previous product version

New Features

- List any net new features or functionality in this release
- What are the benefits of the new feature?

Enhancements

- List changes to existing features
- What is the justification for the change?
- How is the change beneficial?

Resolved Issues

- Detail any problems that existed in the previous release that were fixed in this release
- Include the solution to the issue

Known Issues

- List any bugs that are known to exist when the software releases

Frequently Asked Questions (FAQs)

- Common or anticipated user questions and their answers

Optional (usually only if changed since previous release)

- System requirements
- Installation instructions



Summary



Summary



End-user documentation will make or break your product

Always keep the user in mind

- What do they know already?
- What do they need to know?

User guides contain everything the user needs

Quick reference guides provide “the highlights”

Release notes document the differences between versions



Up next

