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HIGHER ED & RESEARCH TECH SUMMIT

Scaling up public-facing documentation for rapidly evolving learning technologies

Welcome to the session

Thank you for coming today! Here is our agenda:

- **Introductions**
- **Public-facing documentation in UBC's Learning Technology Hub**
  - Why we scaled up
  - How we scaled up
  - How we maintain what we built
- **Q&A Time**
  - What else do you want to know?

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Public-facing documentation in UBC's Learning Technology Hub

Background

Why we scaled up our public-facing documentation

- **Initial minimalist approach to the LT Hub website**
  - Website seen as *about* our support, not *as* our support
  - Tool guides limited to introduction paragraph, basic setup steps
- **Pandemic showed how robust documentation could help us**

Increase our support capacity
Creates self-service, available 24 / 7

Decrease stress
Self-service = immediate help

- **We revised our approach to the website for a better experience**
  - Website now seen as avenue of direct support
  - Tool guides give detailed explanations, instructions, tips

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How we scaled up our public-facing documentation

- **To start, we built the foundation**

1. Determined where in the website information architecture the guides would live
2. Outlined what sections we wanted to consistently use:

Intro	What is [tool]? / What can I use [tool] for?
Examples	How are other faculty using [tool]? (if available)
Requirements	What do I need to use [tool]?
Instructions	How do I use [tool]?
FAQ	Common questions and answers (if known)
Contacts	Where can I get more support with [tool]?

3. Designed layout templates for how the guides would look, work on the website

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How we scaled up our public-facing documentation

- **Next, we established an approach to filling in the foundation**

1. Created a framework for writing (see appendix), using a mapping app analogy:
    - Set a start & end point
    - Pick a best route
    - Stick to the route
    - Sensibly space directions
    - Use consistent references
    - Direct without judgement
    - Don’t recreate the map

2. Developed a checklist / style guide based on above, to reference when writing
3. Detailed a process for writers and reviewers to work together & with the checklist

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How we scaled up our public-facing documentation

- **Finally, we filled in the foundation**

1. Trained writers (typically students) and reviewers (staff) in our approach:

Framework: how to approach writing for the website
Checklist: how to review writing for the website
Process: how to track projects for the website
WordPress: how to make updates on the website

2. Prioritized development of guides, based on criticality of tool to teaching/learning, estimated usage & known issues

3. Tracked progress with tickets in our existing system & an overview table in internal documentation

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Public-facing documentation in UBC's Learning Technology Hub

Current State

What we have ultimately built

- **On lthub.ubc.ca as of today:**

35 instructor tool guides

12 student tool guides

10 tool finder pages

- **38,000+ active viewers on the site in 2022/23 W1 term**
  - 500-11,000 views per top ten guides (more for student than instructor)
- **All our work is licensed under Creative Commons**
  - So you can use it too!

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How we maintain what we built

- **Actively working on the right schedule for regular maintenance**
  - Considerations:
    - Capacity of writers to review
    - Tool upgrade cycles & known feature rollouts
    - Criticality of tool to teaching/learning & estimated usage

- **Proactive documentation meetings help identify key updates**
  - Different groups meet monthly & bi-monthly to reflect on issues, plan ahead
- **Analytics give us some outside perspective on other needs**
  - What people view, click on & search for

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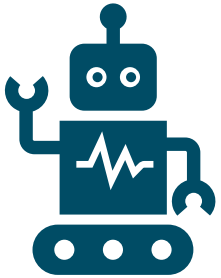
Where we (might) go from here

- **Better measure ROI beyond anecdotal**
  - What else can we do with Google Analytics? Or our ticketing system?
  - How do we know that we are directing limited resources the right way?
- **More direct feedback from readers**
  - How can people tell us if they are getting questions answered or not?
  - Measurements can't tell us if people are or aren't finding what they need
- **Explore using AI**
  - Can emerging tech + our documentation = help us answer questions better?



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What else would you like to know?

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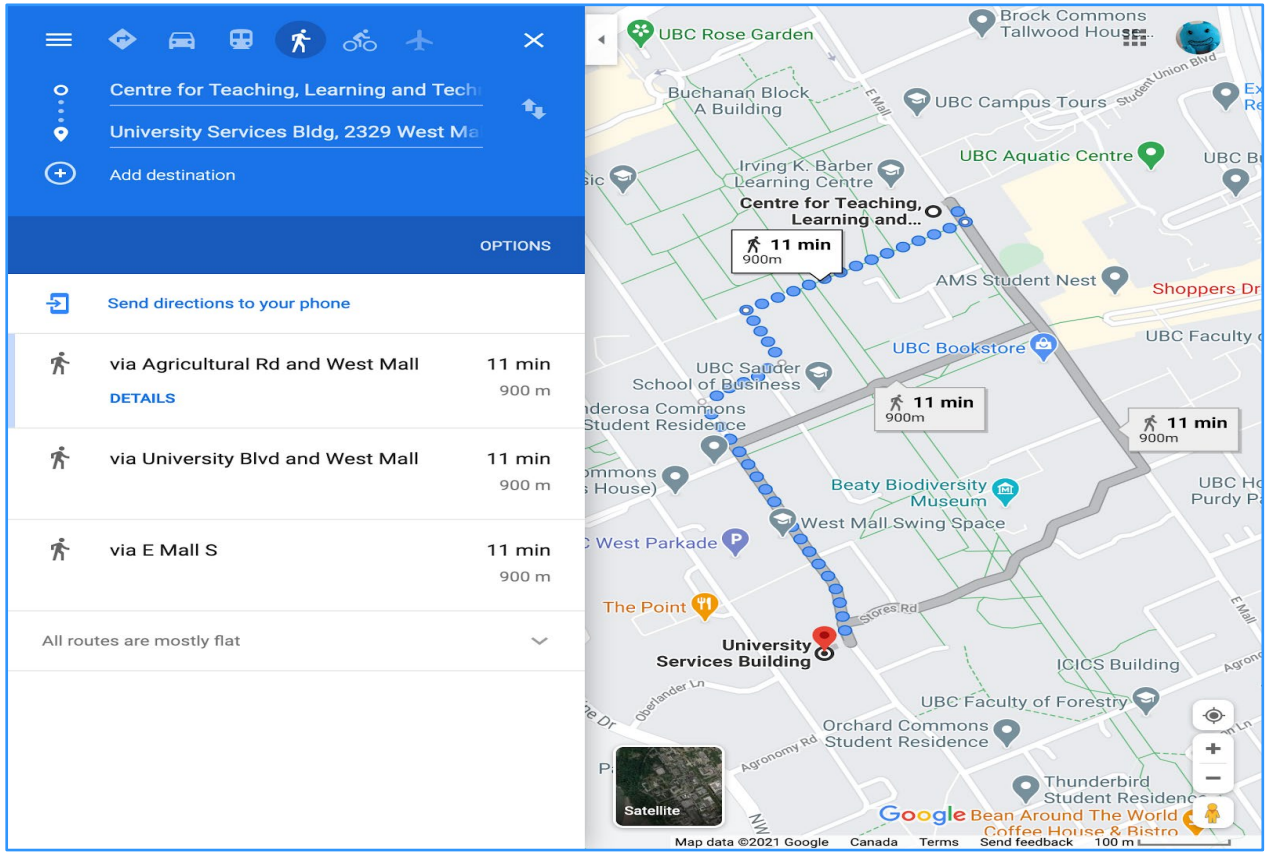
Appendix: Framework

How do we create good documentation?

Writing good documentation is an art, not an exact science.

But you can think about how a **mapping app** works as a framework to steer you (pun intended) to best practices and avoid common pitfalls of writing instructions.



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Best Practice #1

Set a start & end point

In a mapping app, you first enter a start and end point.

Similarly for instructions, be deliberate in choosing where people should start from and what it means for them to reach the end.

- Orient people to where you're starting the instructions, especially when two tools work closely together.
  - *ex: “Log in to [tool] and click Settings…” not just “Click Settings…”*
- Remember that people will not necessarily follow all instructions in a guide in order. To keep them oriented, reference earlier steps as needed.
  - *ex: “Find the assignment. If you do not have an assignment yet, follow the steps above to create one first…”*
- Double-check that the final step is the final action required, even if it seems obvious.
  - *ex: If a form needs to be submitted, say so.*

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Best Practice #2

Pick a best route

A mapping app shows multiple routes, but also indicates a fastest one.

Likewise for instructions, document the easiest route to follow. Multiple options for doing something mostly cause stress, forcing people to make an uninformed choice about what is best.

- When picking a best route, choose what will move people from Point A to Point B with the least amount of friction.
    - *ex: Consider what uses the fewest clicks, repeats familiar steps, follows the most visible workflow.*
- Pick one route even for tools with multiple interfaces. Write steps for the most common interface, while letting people know there are other options available.
    - *ex: Document the web interface but give people a tip that they can download an app.*
- Sometimes you may need to document multiple routes because of hardwired technical differences (e.g., operating systems). Separate and clearly label the steps so people know which to follow.

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Best Practice #3

Stick to the route

A mapping app describes how to get somewhere, not the view or side attractions along the way.

Avoid getting similarly side-tracked in instructions. With each step, take people toward where they need to go.

- Choose headings that clearly describe where you're headed for each set of instructions—they will help you stay on course.
  - *ex: "Add a Course Start and End Date" is better than "Course Settings".*
- Aim to use as few words as possible, to keep your instructions focused. Read sentences aloud to identify ways of tightening them up.
  - *ex: "Click Join" is better than "On the center of the screen, you'll see a Join button. Click on the Join button."*
- When an optional detour is available that most people won't take (e.g., an advanced action), considering framing it at as a tip rather than a step.

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Best Practice #4

Sensibly space directions

A mapping app breaks a route into smaller logical chunks, with a manageable amount of information in each step.

Aim for this same balance in instructions, using natural breaks between steps.

- Keep related actions in one step, rather than make every action a separate step.
  - *ex: Combine clicking a link to reveal a drop-down menu and picking an item from that menu.*
- Limit the number of actions in each step by thinking about what people can store in short-term memory.
  - *ex: Listing six things to click, even when related, is too much to remember in one step. Break it in two.*
- Mention style and orientation thoughtfully, when it will help people find a non-obvious part of the interface. Every detail is another thing to process.
  - *ex: If the button is obvious, use “Click Submit” not “Click the green Submit button below the form”.*

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Best Practice #5

Use consistent references

In a mapping app, 16th Avenue and 16 Ave are not used interchangeably, as that would create confusion.

Instructions should also use consistent language, to not make people wonder if two terms mean the same thing.

- When you work with others, decide what terms you're going to use before getting too far in writing. Setting common terms early saves time in later reviewing.
- Apply consistent language within individual instructions and across the wider website, when you can.
  - *ex: If you're writing about Canvas, check what reference points are already used in our Canvas documentation (e.g., Course Navigation).*
- Consistency should also be used with capitalization and punctuation of terms. Double-check for mismatches.
  - *ex: Avoid using "'Assignments' page" in one place and "Assignments Page" in another.*

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Best Practice #6

Direct without judgement

A mapping app presents a route neutrally, without warnings (“turn right, don’t turn left!”) or assumptions about your driving (“now easily change lanes”).

Instructions should also treat people as neither prone to mistakes nor technically adept.

- Be empathetic about the people you’re writing for, aiming to prevent making them feel scolded, unskilled, or dumb. Avoid words that describe experience (e.g., simply, quickly, easily, just).
    - *ex: “Now simply upload your file!” feels worse if you can’t figure out how to do it than “Upload your file.”*
- When in doubt, assume people know less than you think. Instructions that someone finds too simple are better than ones excluding people who know the least!
- If you do need to include warnings, present them as politely as possible—even when they are very important.
    - *ex: “Please use your real name so we can verify your account” is better than “You must use a REAL name or we will deny you access.”*

Best Practice #7

Don't recreate the map

A mapping app gives specific routes, rather than orienting you to every street in town.

Similarly, instructions in our context should guide people in key activities, not cover every single thing available.

- Remember that we are not the vendor for most technology we support, and it's the vendor's job to document all that their technology can do.
- In scoping out instructions, consider what at least 80% of people will want to do. And trust that many people planning more advanced activities will be the ones more comfortable figuring things out on their own.
- Link people to good places for more information, when appropriate. But don't create a long list of everything available—direct people only to the best starting points.

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