

Moving your documentation online

An article on the things to consider for moving your documentation online

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1 Introduction

Who is this article for?

This article is aimed at businesses who:

- are considering moving their documentation online but aren't sure how to do it, and
- have tried to move their documentation online and didn't get the outcome they were expecting.

Are you not yet considering moving your documentation online?

Businesses who have not yet considered moving to online documentation may be interested in the section *The benefits of online documentation*, which outlines the advantages of online documentation versus printed material.

Why do businesses move their documentation online?

When we ask clients their reasons for wanting to move to online documentation, they most often cite the following:

- Save on document printing, distribution and storage costs,
- Meet a stated aim of the business environmental plan to reduce the use of paper,
- Ensure that all employees use the current version of a document,
- Control access to documentation,
- Streamline document maintenance, and
- Make it easier for employees to find relevant information.

The last reason—*Make it easier for employees to find relevant information*—seems to have the biggest impact on the success or failure of any project to move documentation online.

To see why this is, let's look at the reasons why some online documentation projects fail.

Why do some online documentation projects fail?

We have helped some clients to identify why their attempts to move documentation online were unsuccessful.

Our investigations revealed two recurring themes. In each case:

1. the client simply converted the print-based material or word processor document to HTML or PDF, essentially reproducing a print-formatted volume for reading on a computer.

2. the client's employees found it more cumbersome to both find and read specific information in the converted copy because it was still formatted for reading in print. As a result, the employees didn't use the online documentation.

People read online differently to print

There are many readability studies available on the Internet¹ that suggest most people read online differently to how they read printed material. In particular, people:

- expect to be able to search 'Google' style (think about how you search for general information on the web),
- rarely look beyond the first page of suggested matches (two pages at the most) before trying a different search or looking elsewhere,
- quickly skim over information until they find a heading they're looking for and then only read that section in more detail, and
- find it difficult to read print-based layouts online—especially reference documents that are not typically read from start to finish.

The rule of thumb for online publishing seems to be this—optimise the online searchability of each document, and use:

- smaller chunks of information,
- more headings, and
- more white space.

Our conclusion

Our conclusion is that:

- a converted copy of a print-based document posted online is not *online documentation*, and
- using this approach for reference documents such as policy and procedures manuals may be rejected by many of your employees.

2 The features of effective online documentation

Reader expectations for online searching are met

The most common way that people search for information online is to use a *search engine*—type in a search term and the matching results are presented to you.

Google, Yahoo and Bing are examples of Internet search engines. Search engines are also included in many dedicated document management systems.

¹ Search the Internet for 'how people read online'

Metadata—the key to online searching

Metadata are key words that describe the document subject, content and more. Search engines look for matches by checking each document's metadata. An author includes metadata in a special section of the document that is not displayed to the reader.

Document metadata should be carefully considered in terms of what a person will likely search for. People usually search in a rapid and abbreviated way, preferring short, sharp search terms over complete sentences.

Here's an example of good metadata for a procedure on how to remove a paper jam in a copier:

```
paper jam, copier, remove paper
```

In contrast, the following metadata entries are not so good:

```
how to remove a paper jam in a copier, removing a paper jam in a copier
```

Why? Firstly, because people don't usually search by typing complete sentences. Secondly, the words *how to*, *in a* and so on are unspecific to the document subject—they may even cause the document to show up in unrelated searches.

If your print-based documents don't include metadata, schedule time and resources to develop metadata in any plan to move your documentation online.

Information is broken down into readable chunks

Earlier in this article, we said that online documentation should be presented in smaller 'chunks' due to the way most people quickly scan information when they read online.

Headings

People focus on headings when skimming online content, so use headings more often in online documentation.

White space

Help readers to identify chunks of information by separating each with white space. Include more white space in online documents than you would typically use in print.

Write once, use everywhere

Save effort and avoid duplication by identifying chunks of information that are repeated throughout your print-based documentation before moving it online.

For example, you may have a standard disclosure agreement notice at the start of each policy or procedure manual. Create one online version of the agreement and link to it from every relevant online document. If the agreement wording has to change, you only need to modify the one version—your readers will see the updated agreement the next time they link to it from a related document.

Documents can be easily maintained

Divide your document collections into individual online documents that can be accessed using hyperlinks. This way, you can update the individual documents without having to update the entire collection.

For example, if your policy and procedures manuals are online and divided into individual documents (one for each policy or procedure), you can update a particular policy or procedure without having to re-issue the whole manual.

3 The benefits of online documentation

Reduced printing and distribution costs

Depending on the size of your organisation, you could be spending up to thousands of dollars to print, bind and distribute paper copies of your policies, procedures and other documentation.

If you host your documentation online, there are no printing, binding and distribution costs—your employees access the online documents using a secure account.

Better for the environment

A common aim of environmental policies is to reduce the consumption of paper. If your documentation is online, your employees view the documents using a computer or mobile device.

For those occasions where only a printed copy will do, your employees can print from the online document and recycle the printed copy once they've finished with it.

More effective maintenance and version control

Maintenance

Moving to online documentation provides the opportunity to split your policy and procedures manuals into individual documents (one per policy or procedure). This makes it easier to update your manuals because:

- you only have to update the policy or procedure that has changed, and
- you don't have to re-issue the entire manual, as you would with printed documentation.

Version control

With online documentation, you only have to maintain the one version and provide your employees with the appropriate level of access:

- There are no paper copies to distribute or recall.
- Updates are instantly available—your readers see the latest version the next time they access the document.

Some online documentation systems provide an editing workflow so that an updated version of a document is only made available once all approvals have been given.

Better access control

Printed confidential and restricted documentation must be physically secured and access controlled. There is also a risk of someone accidentally reading a printed document. For example, a confidential manual left on someone's desk may be seen and read by an unauthorised person.

By contrast, sensitive documentation stored online can be secured electronically so that only authorised readers have access.

4 How to move to online documentation successfully

Plan and organise your documentation to deliver a positive online reading experience.

Use the information from your print-based documentation, but re-package it for optimal online searching and reading—don't just convert the print-based documents and post them online!

Five vital steps to moving documentation online

Follow these five vital steps when planning to move your documentation online:

1. Break your existing print-based documents down into logical 'chunks' of information.
2. Identify information that is repeated throughout your documentation and plan to link one centralised version of each repeated chunk of information to all related online documents.
3. Develop metadata for each online document.
4. Design online policy and procedures manuals so that each policy or procedure is an individual online document.
5. Create appropriate levels of online security to control access to sensitive and restricted documentation.

How Maxen can help you

Maxen provides online document project planning and business/technical writing services to both public and private sectors.

Maxen can help you to:

- build a comprehensive plan to move your documentation online,
- determine the most appropriate online content platform,
- identify your existing information and how it should be arranged for online use,
- create relevant metadata to improve the search performance of your online documentation, and
- select the most appropriate tools to maintain your online documentation.

Contact Maxen at <http://www.maxen.com.au>

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2. Every organisation's needs are different—contact Maxen for an appraisal of your online documentation needs, tailored to your organisation.