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October 2012

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A Note from the Editor

WITH THIS ISSUE of Intercom, I am pleased to introduce the 2012–2014 Intercom Editorial Advisory Panel members—Chair Elizabeth (Bette) Frick, Barrie Byron, John Hedtke, Jack Molisani, and Andrea Wenger.

Dr. Elizabeth (Bette) Frick, frequent Intercom author and president of the Text Doctor LLC, teaches writing and communication to employees of corporations and governments in the Denver Metro area and the Twin Cities of Minneapolis–St. Paul. She holds a PhD in English from the University of Minnesota and served as president of the Twin Cities Chapter of STC from 2003–2004 and is also an STC Fellow. Bette is board-certified as a medical editor by the Board of Editors in the Life Sciences and serves as the president of the American Medical Writers Association—Rocky Mountain Chapter (2011–2013). She recently completed requirements for the highest Toastmasters award, the Distinguished Toastmaster (DTM).

With a long and enthusiastic STC history, including authorship in Intercom, Barrie Byron is an award-winning information developer for software products with more than 20 years of professional experience. Barrie is a technical communication professional with a keen interest in new technologies and tools. She is an STC Associate Fellow, past president and membership manager of the STC Palm Beaches Chapter, and publicity chair for the new Greater New York and Philadelphia Regional TechComm Competition. With more than 12 years of Toastmasters experience, she is past president of Princeton Toastmasters and has earned the Advanced Communicator Gold (ACG) and Advanced Leader (AL) credentials.

John Hedtke, STC Fellow, is the award-winning author of 26 nonfiction books and close to 200 magazine articles. He owns and operates JVH Communications, a company that provides writing, consulting, and training services, and Double Tall Press, which specializes in nonfiction books. John blogs about writing on tradebookauthor.com and lists of his books, articles, projects, and awards can be found online at his website, www.hedtke.com.

Jack Molisani, Intercom columnist, was a project officer in the Space Division of the USAF before starting ProSpring Technical Staffing, an employment agency specializing in engineers, project managers, and medical/technical writers. Jack has a degree in computer engineering from Tulane University in New Orleans, is an STC Fellow, and a member of the Project Management Institute. Jack also produces The LavaCon Conference on Digital Media and Content Strategy, a yearly conference founded in 2002 to help businesses manage technology projects.

Andrea Wenger is a senior technical writer with Schneider Electric in Raleigh, NC. With seventeen years’ experience in technical communication, she is president of the Carolina Chapter and communications manager of the Technical Editing SIG. As a member of the Community Affairs Committee, she coordinates the Leadership Resources Webinars. In 2010, she served on the STC Community Support and Funding Task Force. She writes about grammar and style in Carolina Communiqué, the newsletter of the Carolina Chapter. In her spare time, she blogs about writing and personality at WriteWithPersonality.com.

Have ideas for future issues of Intercom? Contact me or one of the editorial members with your thoughts.

—Liz Pohland
liz.pohland@stc.org
WHEN WE CONDUCT usability tests, we want to know how users feel about their experience. But if we ask them directly, we might not get an accurate reflection of how they really feel. Their tendency to respond more positively to questions than we, perhaps, observed in the testing session is called the “acquiescence bias,” and it is a common phenomenon in usability testing.

So, how can we get at their real feelings about their experience? We have found that our use of Microsoft’s product reaction cards gives users control of their story and lets them tell it as they experienced it.

The Origin of the Product Reaction Cards
The product reaction cards are the result of a brainstorming effort conducted by two usability engineers at Microsoft Corporation, Joey Benedek and Trish Miner. Benedek and Miner were seeking ways to get at the elusive quality of desirability in product design, and they had experienced limitations with surveys and interviews in their usability work. They put together a brainstorming session with eight usability engineers with a goal of coming up with the best strategies to try. Two tools emerged in what they called the desirability toolkit. The original desirability toolkit had two parts:
1. A faces questionnaire, in which participants were asked to look at a photograph of a face and rate how closely the facial expression matched their experience with performing a task.

2. Product reaction cards, which are a collection of word cards with 60% positive and 40% negative or neutral words, from which participants chose the words that reflected their feelings about the experience. The words in the deck were selected from prior usability and market research. The ratio of positive to negative words was determined on the basis of the acquiescence bias, recognizing that users tend to be more positive in their responses than observation might support.

The faces questionnaire confused some participants and didn’t produce consistent results, so it was abandoned. The product reaction cards played well, so these were refined before the final card deck of 118 words was determined. Table 1 lists the 118 entries in the product reaction card deck.

A big idea behind developing the cards focused on the simplicity of delivery and the ease of analysis, and the cards met this challenge on both counts. Another major benefit was to set users free from the constraints of surveys and questionnaires so that they could choose the cards they felt matched their experience and use them to tell the story of their experience. The cards proved to be perfect for this hoped-for response, and the most surprising outcome was that participants volunteered lots of information that had not come out beforehand.

At the time that Benedek and Miner presented these findings in 2002 at a Usability Professionals’ Association (UPA) conference, they said that the results from using this technique could not be generalized. We believe that the results can be generalized. We want to share why and how we can make this statement.

**Going Beyond the Usual Techniques**

Post-task and post-test questionnaires are an integral part of usability testing and we use them in almost every study. Most commonly, we use 5-point Likert scale questions to see how our participants rate their experience with a task. For example, we’ll ask them to rate the task they just completed on a scale of very hard to very easy. Another scale-based question we use relates to satisfaction. The participants rate their experience with the task from very satisfied to very dissatisfied. These scale-based questions give us basic results that can be quantified and illustrated in graphs. This is an excellent way to show trends across the participant pool.

However, there are a few problems with these types of data collectors. Post-task and post-test questionnaires are closed-ended, asking participants to agree or disagree with a statement or rate a response to a particular statement or question.

Semi-structured interviews and open-ended questions are another way to gather feedback from a usability study’s participants. However, when it comes to feedback on design, Michael Hawley makes the case for why a simple question can be so difficult to analyze. In his work testing Web page designs, Hawley found that when participants were asked to explain their design preference, they often said they might like a design for superficial reasons, such as it’s my favorite color. In other cases, they couldn’t articulate a preference. Without a framework or a scaffold through which they could express themselves, many participants were lost. None of the standard ways of getting at emotional response worked until Hawley tried the product reaction cards.

<table>
<thead>
<tr>
<th>Accessible</th>
<th>Compelling</th>
<th>Disconnected</th>
<th>Exciting</th>
<th>Impressive</th>
<th>Not Valuable</th>
<th>Reliable</th>
<th>Too Technical</th>
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<td>Overwhelming</td>
<td>Sophisticated</td>
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<td>Frustrating</td>
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<td>Not Secure</td>
<td>Relevant</td>
<td>Time-Saving</td>
<td></td>
</tr>
</tbody>
</table>

Table 1. The 118 entries in the product reaction card deck
**Pick a Card, Any Card**

Here’s how the product reaction cards work. In Microsoft’s approach, they asked participants to pick any number of cards they wanted, then narrow their selection to a top five and present them. Hawley and others have reported putting them into an online survey or spreadsheet.

We have found that the cards work best in the following way for our lab studies, with a variation for remote studies we’ll explain later.

We put all our cards on the table, literally.

In most of our usability studies, we use the cards as a post-test measurement. We’ve used them in a post-task scenario when we are doing comparative evaluation studies so that we can compare the card choices for each product or version in the study. Coming at the end of the user’s experience with the product gives the participant the chance to reflect on the whole experience and gives us a holistic assessment of a participant’s overall experience.

At the end of a participant’s test session, we direct the individual to the table with the cards, which are randomly placed along the table. The participant is asked to pick three, four, or five cards—or more, if they want—to describe their experience. In just a few minutes we’ve got their choices, and they can now use the cards to tell their story. As their story unfolds, we learn not only the meaning of the words on the cards, but also what is most important to the participant in motivating his or her choice.

In remote studies, we show the list of the words in a Word table on the screen at the end of the study, give the remote participant mouse control and ask them to highlight the words they select as they explain each one.

We log the cards the participants choose and what they say. We use this explanation as part of our report and video highlights tape.

For each participant, we shuffle the deck and repeat the process. On completion of the study, we compile each participant’s card choices into one large data set and begin our analysis.

**Where the Magic Happens**

There’s real magic in the cards. The results always tell a powerful story about how desirable our participants found the process or product undergoing testing. However, the way in which the cards reflect the user’s story continues to amaze us.

Our first level of analysis is very simple; we tally the number of positive and negative cards selected in the study. This breakdown is our first indicator of participants’ general feelings about their experience in the usability test. For example, in a 10-person study, let’s say 57 total cards were selected. If 10 (18%) were positive and 47 (82%) were negative, we’d make an early assertion that this product isn’t a contender for the congeniality award.

Our second level of analysis—a detailed look at the individual selections—takes the cards from magic to near mystical in their powers.

In study after study, we see the phenomenon of repeated card selections. What do we mean? This time, let's consider a study with eight participants. By repeated card selections, we mean a particular card—we’ll use *Time-Saving*—is independently selected by multiple participants. As an example, it’s not uncommon for us to see a card like *Time-Saving* selected six times. We might also see the card *Fast* selected five times and *Efficient* selected four times. Now, take a moment to consider what this means.

**Figure 1. Positive card choices are displayed in a word cloud**

**Figure 2. Negative card choices are also displayed in a word cloud**
We are seeing desirability, without a doubt. Participants are telling us the product was Time-Saving, Fast, and Efficient—these are cards that reflect a positive emotional response about the product. We’re also seeing a theme in this grouping around the notion of speed. Participants are telling us that they could perform the tasks quickly. Finally, we’re gaining an understanding of something even more intangible than desire: that “something” is shared experience. Multiple participants in the study are coming to the same conclusion. Right there, our findings get a real boost from participant responses.

Here’s an added benefit from the cards: They give us a way to triangulate our findings from other feedback mechanisms—like Likert-scale surveys—used in a study. If most of our participants ranked our tasks as very easy to complete in a survey and we see a significant number of positive card choices related to speed and ease-of-use, we know we’re getting good results.

### Showing the Results

One of the most engaging and creative enterprises with the cards is creating a graphical display of the results. Over the last several years, we’ve tried visuals ranging from a basic table or bar graph to pictograms and word clouds. While there are no hard and fast rules about how to display the results of the cards, our best piece of advice is the following: Choose a display that has the most meaningful impact for your targeted audience.

Every study is different. In some cases, we may have high numbers of repeated cards but no thematic connection between the cards. In others, we may see that the repeated cards are low but the cards form strong themes. Still, in most cases we predict and are constantly amazed at the overlap in both the same cards selected and the cluster of similar themes that are revealed in analysis. And this result is as often present in studies with only five or six participants as it is in larger studies. The card choices will differ from study to study, but the consistency in the choices by participants in each study is the amazing outcome.

### Here’s an example of the results from a study

One of our recent usability studies centered on an interactive voice response system, in which 15 participants were asked to listen to various telephone system prompts and choose the number on the telephone keypad that most closely matched their goal for each task.

In this study, the total number of cards selected by all 15 participants was 84. Of that 84, there were 59 (70%) positive selections. Once again, we saw high numbers of repeated cards in the study:

- Efficient = 6
- Easy-to-Use = 5
- Effective = 4
- Time-Saving = 4
- Business-like = 3
- Convenient = 3
- Straightforward = 3

Participants were happy with this telephone-based, customer-service system and had a strong shared experience. In terms of significant themes, Ease-of-Use and Expediency were predominant.

This study’s negative choices were 25 cards, or 30%. There were far fewer repeated card choices, with Time-Consuming chosen four times and Inconsistent three times.

Because the results were to be presented in a meeting and via a slide presentation to management, we felt the word cloud would have the best impact for the intended audience (see Figures 1 and 2).

For examples of how we have presented the results from other studies, see our work in the Suggested Readings section.

### Conclusion

We’ve found the cards unlock information regarding the user’s sense of satisfaction in a more user-centered way than any other tool or technique we have tried. In our experience, the reason for the success of product reaction cards is simple: this tool provides a way for users to tell the story of their experience, choosing the words that have meaning to them as triggers to express their feelings—negative or positive—about their experience.

We hope you’ll try Microsoft’s Product Reaction Cards in your work—the results are truly magical. And the good thing is that Microsoft has given permission for free use of the cards with the following attribution: “Developed by and © Microsoft. All rights reserved.”

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CAROL BARNUM is director of graduate programs in information design and director and cofounder of the Usability Center at Southern Polytechnic State University. Barnum is an STC Fellow and recipient of STC’s Gould Award for Excellence in Teaching Technical Communication and the Rainey Award for Excellence in Research. Her latest book is Usability Testing Essentials: Ready, Set ... Test!

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**Suggested Readings**

Barnum, Carol M. *Usability Testing Essentials: Ready, Set ... Test!* Boston: Morgan Kaufmann, 2011.


MAKING USABILITY A PRIORITY

Advocating for the Value of User Research

By Cory Lebson
AS A CONSULTANT specializing in user research, studying how users interact with Web and mobile resources, I wish I could give my clients a short contract to sign promising that if they work with me, they will definitely incorporate usability into their project. They will listen to my suggestions and they will follow through with all the recommendations offered that make their product easier for users to use.

I, the ever grateful client (customer, boss, coworker), promise to incorporate usability into my project, to listen to all of your suggestions, to take your recommendations, and to follow everything that you have to say in order to improve usability and provide for the betterment of humankind.

In reality, if I were to actually suggest this, I would not have much success but rather would be seen as a crazily idealistic usability specialist. Likely, I wouldn’t even get to work on the project at all.

The truth is that, in many cases, user research is not a project unto itself. Rather, it is part of a larger Web-centric project effort. These larger projects often have a project manager or a project management team. This person or team has the task of coordinating the usability effort into the broader project launch schedule with the ultimate approval of the primary stakeholder or stakeholders.

The project manager or management team generally has some kind of technology management background, but often without extensive experience in usability. This lack of knowledge about usability isn’t inherently a problem, and this is the reason why my company is pulled into the project in the first place. However, a lack of knowledge about the value of usability research can bring about some reluctance. Based on my experiences and lessons learned, here is a “cheat sheet” of things the project manager or management team will often be considering when planning and incorporating user research into projects.

No matter what your role is on any given project, you can help make usability, and specifically user research, a priority. If you hear any of the counterpoints to usability that appear below, this cheat sheet will prepare you for how to respond to support important user experience research.

“I’ve got an incredible design team. I don’t need to have anyone evaluate it.”

I never send out any kind of formal document without having one of my staff review it. No matter how good a writer I think I am, I am 100% sure that I’ll have typos in that document that I won’t find no matter how much I try to look for them. I’ll miss them because it’s my baby. Similarly, a design team, no matter how good they are, will not be able to see many issues with something they developed. A design team may also wish to do their own testing where the designers also operate as usability test moderators.

Recommendation: Don’t assume that a design team, no matter how amazing it is, will be able to see flaws in their creation. Although someone who is an interface designer can also be a usability evaluator, I’d highly recommend that they don’t evaluate a creation that they had a large part in designing. The risk of asking biased questions or having biased responses is much higher, and the risk of not seeing flaws is all that much greater. Ideally, someone who has had no role in the creation should be evaluating the site or application.

“Usability testing is too expensive.”

I sometimes hear the contention that the budget doesn’t allow for usability testing. Once figuring in not only labor hours but also other direct expenses, such as participant recruiting costs, participant incentives, and facility rental, costs may seem like they are really starting to add up.

Recommendation: There are a number of arguments to be made for the cost-justification of usability testing. Even as early as the mid-1990s, there were books and articles published on this very topic (such as Cost-Justifying Usability, a classic revised in 2005). In addition, usability testing doesn’t have to be terribly expensive. First, calculate out what a typical usability study might cost, with an optimal number of representative users in an optimal location with optimal incentives. Look at the final number: is it really too high? If so, consider reducing the number of participants; even if not optimal, at least a fair bit of valuable information is likely to emerge from testing. Similarly, I like to produce full written reports with test results and recommendations, along with a PowerPoint summary report, but if budget (my allotted hours) doesn’t permit, I might just produce the PowerPoint summary report and make certain to at least convey the key ideas of the findings. In the more uncommon instance that the budget is larger than the base optimal projections, a usability researcher can always add what I’d consider “deluxe” options, such as a highlights video from the sessions.

“But we really can’t afford testing.”

Sometimes the budget is really tight, and the client feels that they absolutely can’t do usability testing.
**Recommendation:** While not optimal, at a minimum you should consider a quick expert review. I’ve done reviews for clients with results given as short bullet points in an email, which helps save time and thus cut costs. Expert reviews never let me see a real user’s actions or hear their thoughts as they “think aloud,” and I also must rely on whatever assumptions and knowledge I possess about users’ usage. So along with an expert review, certainly consider a usability test with only a small number of users that is observed by the stakeholder. Instead of spending time writing any report or even a summary, consider a quick debrief meeting a day or two later to talk about trends and observations. Again, this might not be optimal, but at least there is some evaluation time squeezed in.

**“Our schedule is too tight for usability testing.”**

Often, timetables are tight and stakeholders may feel rushed. When stakeholders hear that a usability study may run over a period of three days and that the report will take a few more days, they may get the impression that the usability evaluator expects all work to stop during this period. Stakeholders will express the concern to the project managers that there simply isn’t enough time for usability testing.

**Recommendation:** Let the stakeholder know that not only do you know that time is tight, but you also know that the usability practitioner does as well. Other work on the project does not have to stop for the usability test to take place. Further, if the development environment is flexible enough, and ideally if there is perhaps an extra day or two between sets of participants, there may be enough time not only to make changes to a prototype, but also to test out some of the changes with the next round of participants or to adjust the test plan and drill down and zero in on key problems very rapidly.

**“Usability testing will increase my project scope dramatically. Even worse, I don’t want to have to start from scratch!”**

There may be a looming deadline, and even if there is the time to squeeze in a usability test, stakeholders may be afraid that the results are going to be less than perfect. They’re envisioning at least one whopper of an issue and afraid that the results are going to be less than perfect. There may be a looming deadline, and even if there is the time to squeeze in a usability test, stakeholders may be afraid that the results are going to be less than perfect.

**Recommendation:** In my experience, with a good development team that has a reasonably good sense of design principles, the testing often uncovers a few larger changes, but usually it uncovers a number of problems that can be fixed with minimal impact to the development schedule. Even if the stakeholder sees some large-scale recommendations, assuming that there are no show-stoppers, these should be cataloged and saved for a future release. It’s okay to start your list of fixes for the next release even before this one is out. All the minor tweaks and low-hanging fruit, however, could be attended to immediately, and the stakeholder could see a large value-add for minimal cost.

**“We’re already doing software testing—we’ve got it covered!”**

Sometimes project managers are aware that there is this testing approach called “usability testing,” but they figure it’s not much different than the software/functional testing that they are already doing. They may have spreadsheets of actions that a user is supposed to be able to do, and they need to make sure that all of the design specifications are met. While this software testing is certainly important, project managers may not realize that usability testing is focused on the success of actual users using the website, instead of just verifying that the functionality exists and is working as initially intended. What if those initial intentions and assumptions were incorrect for the expected audience group?

**Recommendation:** Consider the needs of the actual users of the site, not just the specifications that have been handed down to you by the stakeholders.

**“I’ve done testing for my desktop Web projects, but do I need to do testing for similar mobile content/apps as well?”**

Suppose you have done a good job integrating testing into websites in the past. But now, you are doing a mobile project. Maybe it’s your first. Maybe you’re “converting” your desktop site to a mobile site, or maybe you’re porting functionality to a new mobile app, or maybe you are creating a “responsive design” that, in theory, should be completely usable across devices. Since things worked smoothly on the desktop version, do you need to concern yourself with mobile version testing too?

**Recommendation:** Absolutely. Usability is very much framed by context and audience. The context of desktop use is likely to be different than the mobile context. Users will probably be in different situations when they use the mobile version than the desktop version. Also, the users of each are apt to be different and only some of your desktop users are likely to be using mobile. It’s important to categorically understand these differences, which will inform both who you will be recruiting for your test and also what scenarios you might be testing with.

**“I really do want to do usability testing, but the stakeholder is only permitting me one shot at it.”**

A stakeholder may concede that usability testing is important but say that only one round of testing will be supported. At what point should the testing be done? At the beginning of development to get things off on the right
If someone questions the usability evaluation efforts, be prepared to explain the decision and defend this approach. Try to help this person or people to understand that including a usability component doesn’t indicate a lack of trust in the team, but rather is an appropriate step for any project. Also, remember that one of the best things that you can do is make sure that the stakeholders are part of the usability activities to whatever extent you can convince them to participate. When I looked in my photo archive of some of my own studies, it confirmed my observation that sometimes stakeholders are not fully involved in the usability testing effort. While I couldn’t find a picture of a stakeholder observing a usability test through the one-way glass, I did find evidence of the stakeholder’s presence in the picture above—a coffee cup! When stakeholders observe usability testing, they get a great first-hand look at the usability of their product. When they observe real people stumbling and uncovering issues on their site, they are much more likely to realize the value of user research.

CORY LEBSON has functioned as a user experience consultant since 1994. He established Lebsontech LLC (www.lebsontech.com) in 1997, and, with a staff of three, his core client base has included a number of organizations and has led to usability projects for government, nonprofit, e-commerce, and educational institutions.

Cory enjoys functioning as an evangelist for usability. His primary passion is for user research, and he has conducted hundreds of usability test sessions and user research activities. Cory also greatly enjoys teaching topics related to user experience and technology. He currently conducts monthly seminars and is a frequent speaker at local area events and national conferences.

Cory has an MBA focusing in marketing and technology management, as well as an MA in sociology and a BS in psychology. Cory is also the president of the DC chapter of the User Experience Professionals’ Association (UXPA) and is on the board of directors of UXPA International, as the director of strategic partnerships. Cory can be found on Twitter (http://twitter.com/corylebson) and LinkedIn (http://linkedin.com/in/lebson).
For over 10 years, Net-Translators has helped technology companies and medical-device manufacturers prepare their products for global markets. Our comprehensive localization services portfolio, experienced customer-focused project teams, and unique quality-centered approach help us consistently exceed customer expectations for deadline, budget, and accuracy. We have earned the trust of industry leaders worldwide, so you know your products are in good hands.

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Exploring Users’ Expectations and Impressions of Scenario Documentation

By Morgan Dennis

This article describes a situation in which a team of writers at IBM developed a model for writing scenarios to be published with the first release of a new product, InfoSphere BigInsights, in May 2011. To determine the scenarios’ effectiveness at reaching the target audience and satisfying audience goals, we conducted usability testing with target participants in order to understand their expectations of the scenario genre, as well as their impressions of our scenarios, and to implement audience-driven changes to the scenarios’ structure and content.

This article explains the impetus for the testing and some of the challenges we encountered, all the while emphasizing the importance of usability testing for writers and the insights that testing with target populations can offer. It also outlines practical approaches to conducting testing and offers recommendations and considerations for adapting usability research to different team situations.

Background

In preparation for the InfoSphere BigInsights V1.1 release in May 2011, we produced a new type of documentation—the scenario, or extended example or use case (used interchangeably here). The function of our scenario is to identify a common business problem of Big Data users and to describe how InfoSphere BigInsights solves that problem, underscoring the value of InfoSphere BigInsights to potential customers.

At the time these scenarios were written, the Information Development (ID) team was composed of technical writers, two of whom developed the scenarios; a team lead, who directed the project’s schedule and resources; an information architect, who collaborated with the writers to develop the scenario template; a technical editor, who reviewed the template and drafts of the scenario; and a manager, who oversaw the project and provided insight and direction.

When it was published, the scenario consisted of five topics:

- An overview describing the business problem and explaining, at a high level, how InfoSphere BigInsights could solve that problem
- A description of the business and technical challenges, which identifies common challenges that users face as they deal with their business problem
- An overview of the solution, written for an audience of decision-makers, that summarizes the high-level process of implementing InfoSphere BigInsights
- A detailed description of the solution, targeted to a technical audience of database administrators, which provides details about architecture and implementation
- A thorough explanation of the results and benefits of the InfoSphere BigInsights solution to potential customers

Testing Objectives

While developing these scenarios, we researched the ways in which other IBM teams had written similar information. Unable to find a model that presented the precise content that we wanted to convey in a way that was suitable for our purposes and audiences, we developed the template based on a rhetorical analysis of the needs and expectations of our target audience, covering only those areas we thought our audiences expected from this genre.

Unsure, however, whether the depth and coverage of our content met our users’ needs, whether the subject matter identified a problem to which they could relate, and whether users understood the value of InfoSphere BigInsights to their enterprises, we wanted to conduct usability tests to:

- Understand our target users’ expectations of the scenario genre
- Determine user satisfaction with the scenario structure and content
- Identify recommendations for improving existing and future scenarios
Challenges
Once we decided to user test our scenarios, we faced interesting challenges, specifically relating to:
- Identifying the target audience of the scenarios
- Recruiting representative test participants
- Designing test questions that addressed the testing goals
- Analyzing test data
- Validating changes to the scenario template and content

Identifying Target Audience
After eliciting the input of the development and solution enablement teams and considering the functions of the information, we concluded that the primary readership of the scenarios consisted of two main groups:
1. Business analysts, who evaluate new products to determine whether those products have value to their organizations
2. Technical users, who evaluate new products to determine whether those products can be integrated into their organizations’ infrastructures

Given the requirements of these two audiences, the scenarios had to be written in such a way so as to satisfy the needs and goals of each group quickly and effectively—another challenge when considering the requirements of each group in terms of presentation of the information, the role of tone and voice, the level of detail, and the structure of the information for both audiences within the same information unit.

Recruiting Representative Participants
Our team worked closely with the user experience coordinator at IBM, who helped define our user profiles and recruit test participants who had experience in one or both of these roles. She developed a recruitment screener that participants completed describing the types, natures, and durations of their industry backgrounds. We recruited a total of nine participants—five business analysts and four technical administrators; some participants noted that they had experience in both roles.

Designing Meaningful Test Questions
Our primary research questions queried how users felt about the scenarios—namely, if the structure and content of the scenarios facilitated their understanding of the value of InfoSphere BigInsights to their organization. To this end, we developed pre-test questions that asked about participants’ experiences with and expectations of the scenario genre:
1. When have you written or read scenarios in order to make purchasing decisions?
2. When you are considering a new product, what types of information do you access to help you narrow down options?
3. When has scenario documentation met or not met your needs?
4. How likely are you to read multiple scenarios for a single product?
5. What kinds of information must scenarios include to enable you to assess whether a product will satisfy your business need?

Following the pre-test interview, we asked participants to read two separate scenarios, noting aloud any observations or reactions as they read. After each scenario, we asked whether the business problem that each scenario identified was relevant to their jobs.

Finally, we wanted to understand participants’ overall impressions of our scenarios. To this end, we developed questions that would explore participants’ reactions to the scenarios’ structure and content as well as their impressions of the product. We asked the following questions after participants had read both scenarios:
1. How well do the scenarios help you understand whether InfoSphere BigInsights has value for your enterprise?
2. Do the scenarios contain enough detail for you to understand how InfoSphere BigInsights would help solve a business problem, and then to implement that scenario in your organization?
3. Are the scenarios general enough that you can understand how they can apply to your enterprise?
4. What types of information are the scenarios missing or are underdeveloped that would help you better understand or implement InfoSphere BigInsights?
5. On a scale of 1 to 5 (with 1 being very dissatisfied and 5 being very satisfied), how satisfied are you with the structure (form) of the scenarios?
6. How satisfied are you with the completeness of the scenarios?
7. How satisfied are you with the organization of the scenarios?
8. How would you rate your overall satisfaction with the scenarios?
9. If you would be interested in this product, what would your next steps be?

Analyzing Test Data
Following completion of all nine tests, we collated our session notes and analyzed participants’ responses to each question, noting trends and patterns in their sentiment. We identified quotes that captured key ideas, noted nonverbal expressions, and reviewed other qualitative feedback. Additionally, we tracked the positive and negative responses, suggestions, questions, and comments, and we tallied the quantitative scores for each question.

Based on this analysis, we developed conclusions about the stronger and weaker portions of the scenario, and we drafted, reviewed, and implemented a prioritized set of recommended changes to the scenario template. Furthermore, with the deeper insight into users’ habits and preferences of reviewing documentation and their expectations around the scenario genre, we were able to draw larger conclusions about how users want to access and consume information, enabling us to implement changes to other information deliverables as well.
Validating Recommendations and Changes
After incorporating the revisions to the scenario model, we wanted to confirm that our changes improved users’ overall perceptions of the scenario quality. We recruited six additional participants—three new participants and three who had tested during the first round. Our goal for this second round of testing, in addition to confirming that participants perceived the revised scenarios as better than the first versions, was to ascertain whether repeat participants would rank the quality of the scenarios higher or lower than participants who were seeing the content for the first time.

New participants were given the same test protocol as the participants who tested during the first round. Repeat participants were asked to review the revised scenarios and then asked post-test questions that assessed their comparison of the first and second drafts of the scenarios:
1. Did you notice changes to the content or structure of either scenario? If so, what? What can you say about the (positive? negative?) impact of these changes?
2. Is there anything that is missing or that is underdeveloped?
3. Do the scenarios contain enough detail for you to understand how InfoSphere BigInsights would help solve a business problem, and then to implement that scenario in your organization?
4. Should the “Results and Benefits” topic appear in the navigation list?
5. Since your first review of the scenarios, we added a “Learn More” topic into the scenario template. Do you think it is in the right place? Do you want to see it in the TOC? Would you like to see it include anything else?
6. On a scale of 1 to 5 (with 1 being very dissatisfied and 5 being very satisfied), how satisfied are you with the structure (form) of the scenarios?
7. How satisfied are you with the completeness of the scenarios?
8. How satisfied are you with the organization of the scenarios?
9. How would you rate your overall satisfaction with the scenarios?

During the data analysis of the second round, we were able to:
- Confirm that participants held higher opinions of the revised scenarios than they did of the original scenarios.
- Validate the impact of the revisions.
- Explore unanswered questions that arose during the first round.

Adapting and Applying Our Testing Methodology
While our methods were developed according to the specific needs of our situation, including our schedule, team, research questions, and testing objectives, our methodology can be generalized and applied to other teams that might want to conduct similar research. For example, before designing any user research session, we recommend that writers or designers explore questions such as:

- What is the target user of the product or information?
- What do they think about the structure, depth, coverage, and presentation of the information?
- What is at stake?
- How can this topic, section, or information be improved?
- What else do I not know about my users, their needs, or their expectations about this information?

After an analysis of the rhetorical situations surrounding potential testing opportunities, research teams can develop test plans with meaningful questions that deliver actionable insight to improve deliverables according to audience expectations.

Discussion and Recommendations
In considering the rhetorical situation around a potential user testing situation, consider the team schedules and resources:
- What are the constraints of the release schedule and when can the test be run?
- Does the team schedule allow for a subsequent round or rounds of testing?
- Given the content or subject of the test and the maturity of the design or information, how iterative should the testing be?
- Does the test require internal or external participants?
- Does the team collaborate with a usability team or representative who could review the test plan, act as a pilot participant, take notes during test sessions, help facilitate the test, and assist with test data analysis?

Consider, also, the context of the issue or problem that is being explored:
- What question or problem is the team trying to figure out?
- What data or feedback will solve the problem?
- What is the scope or range of the research question?
- What type of test is best suited to returning the necessary information or data?
- What is the target user of the product or information?

Once our team explored these questions, we were able to develop a test plan that reflected our questions and objectives, recruit representative participants, conduct test sessions, and obtain valuable data that helped us improve our information deliverable.

MORGAN DENNIS joined IBM as an information developer in 2008 and is currently working on the Big Data portfolio. She completed her PhD at Purdue University in rhetoric and composition, where she was a part of a research team that conducted usability testing on the Purdue OWL. She completed her MA at West Virginia University in professional writing and editing and her BA at Assumption College in English. Her research interests include issues and developments in the fields of professional writing and usability, especially around documentation and information design.
Multi-Screen, Single Output
- Desktop
- Laptop
- Mobile
- Tablet
- Industry Specific

Multi-Channel
- Online
- Intranet
- Print
- Local Files
- Electronic Books

HTML5 Publishing
- Responsive UX Design, Scalability...
- No Expensive Suites, Schedule Queuing, Automatable...
- Technical Communicators Help Authoring Platform
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Why Go Mobile?
One of the hot topics on the forefront of today’s technology buzz is mobile compatible content. Many experts today are emphasizing the importance of Web content compatibility for mobile viewers. Statistics show more and more people are choosing to connect to the Web via their mobile devices. The smartphone market began outselling the desktop market at the end of 2010, and projections state that by the year 2015, Web users will be connecting to the Internet more often through mobile devices than through desktop computers. But is mobile just connecting to the Internet? The answer is no. Mobile is smartphones, tablets, or any device that gives the user the freedom to walk away from their desktop. Companies are handing out iPads to replace notebooks, and cloud computing makes it possible to synchronize files, photos, and music so users can have access anywhere they go. Mobile devices are now the preferred way for users to access any information.

What does this mean for technical writers? Technical writers can now deliver documentation to end users nearly anywhere. They can virtually set up shop in the pockets of their customers. It is easier than ever for you to connect with end users today, but it is just as easy for your competitors to do the same. If you don’t keep up with the growing trends of mobile development, your competitors gladly will, and they will take your customers’ loyalty with them.

What Is Responsive UX Design?
Responsive UX design is a method or set of techniques used to increase the quality of the user experience when viewing browser-based information. This includes responsive Web design, which is about generating a single instance of Web-ready content that has the capability of displaying across multiple devices based on screen size, platform, and orientation. Future developments in responsive UX design will include responding to the users’ needs and behavior to enhance the overall experience. Responsive content is intuitive to its surroundings, allowing browsers to depict their own parameters. This progressive concept has become a major focus in designing for the mobile market today. Making your content cross-browser, multi-platform compatible is an essential business strategy that must not be overlooked.

Prior to the advent of responsive design, the solution to cross-platform functionality was centrally focused on a complex content strategy that involved the creation of an alternate set of content to be dedicated to mobile users. This intensive content left developers with added workflow steps and duplication of content. Having two sites meant twice the development, twice the output, twice the maintenance, twice the cost, and most important of all, a degraded experience for end users. While this content strategy worked, it was obviously not ideal. The alternate content was created for the miniature screens of mobile devices, but it was still not adaptive to the vast array of screen sizes and varieties of mobile devices.

Responsive design is a “single source” answer to cross-browser, multi-platform, multi-display compatibility. It utilizes a single instance of content and code to lock in content consistency and functionality across all devices. Furthermore, you not only guarantee accessibility of your content to all your end users, you also preserve a canonical URL that maximizes the ability to find and share your content throughout the Internet.

Is Your Content Responsive?
So how do you know if your existing content is responsive? Since truly responsive content has certain specific qualities, it’s easy to measure whether or not your own content is responsive. We’ve developed a checklist that you can use to measure the responsiveness of your content. We urge you to pull up some of your help documentation on your mobile device and put it to the test. If you answer yes to any of the following questions, then your content is not responsive.

- Does the page redirect to an alternate, mobile-specific website?
- When you first open the page, is the text too small to read?
- Do you have to zoom in and out to see all of the content?
- Do you have to scroll left or right while reading text?
- Is it difficult to select links or buttons that you touch?
- Is it difficult to view large images or tables without using zoom?

Common Misconceptions: What Isn’t Responsive Output?
Many believe that if their content is HTML5 and CSS3 compliant, then their content is responsive, but this is actually far from the truth. While HTML5 and CSS3 provide additional building blocks for creating responsive content, using these standards does not automatically mean that your content will
be responsive. Instead, it’s how you utilize and fashion these building blocks that makes your content responsive. This can prove to be a complex process for those not adept in the implementation of HTML5, CSS3, and JavaScript. Fortunately for technical writers, creating content that is responsive can be as easy as selecting the correct help publishing solution. This will give today’s technical writers more time to focus on their content and design and allow the browser to handle the stresses associated with cross-browser and multi-device compatibility.

Advantages to Technical Writers

The goal of responsive design is to create a single instance of content that works across all environments. Thus, from an authoring perspective, technical writers can continue to implement single-sourcing strategies for the creation of content and eliminate the need for, and thus time spent on, crafting an alternate set of content to adapt to mobile devices. They can rely on publishing systems that create responsive output directly from their single-source authoring systems. With such content-intensive technical documentation, authors will not have to worry about the technicalities of how content will display on mobile devices.

Other Advantages

We’ve all tried to understand those search engine algorithms affecting our rankings in search results and have tediously sought ways to better our SEO rankings. Responsive content is one proven method of helping your ranking. Both Google and Bing, the two most utilized search engine companies, recommend the use of responsive design. The following was posted in Google’s Webmaster Central Blog on 6 June 2012:

Using Responsive Web Design has multiple advantages, including:

- It keeps your desktop and mobile content on a single URL, which is easier for your users to interact with, share, and link to and for Google’s algorithms to assign the indexing properties to your content.
- Google can discover your content more efficiently as we wouldn’t need to crawl a page with the different Googlebot user agents to retrieve and index all the content.

This post came nearly three months after Duane Forrester stated on the Bing Webmaster Center Blog that “At Bing, we want to keep things simple by proposing the ‘one URL per content item’ strategy.” He went on to explain the following:

By outputting only one URL for the same content, you will have the following benefits:

- You have more ranking signals coming to this URL.
  Example: the vast majority of mobile URLs do not have inbound links from other websites as people do not link to mobiles URLs like they link to regular Web-situated URLs.
- There is also less search engine crawler traffic coming to your Web servers, which is especially useful for large websites. Fewer URLs to crawl reduces the bandwidth our crawlers consume.
- Less work (and potentially less cost) building, updating and maintaining a stand-alone mobile-focused website.

How Do I Make My Documentation Responsive?

Anyone can make documentation responsive, though the task is not always easy. Resources such as http://googlewebmastercentral.blogspot.com/2012/04/responsive-design-harnessing-power-of.html will give you step-by-step instructions on how to ensure that your documentation is responsive. However, for technical writers focused on content creation and structure, it is often beneficial to select a publishing tool that automatically yields responsive content in its output. Be careful to make sure you put any publishing tool claiming to produce responsive content to the test. You can quickly see how your tool’s content performs using a responsive test tool such as www.responsinator.com.

If you choose the right publishing tool, the responsiveness will be inherent to your output, leaving your technical writers to focus on content. You will have one set of content to develop and one set of content to maintain. Through responsive design, your published content will create a far more effective user experience.

Summary

Mobile technology has made great strides in the way online content is viewed today. With the rapidly increasing number of mobile browsers in today’s market place, the versatility of the user experience has reached an all-time high in level of importance. The next step in accommodating this advancement is the adoption of responsive output, which affords the following:

- Responsive content alleviates the need for creating alternate content to cater to the mobile market, thus cutting your workflow in half and allowing you to focus your efforts on one set of output.
- Responsive content lets your browser do all the work in proportioning your content to the associated device it is being viewed on, cutting down on scrolling, zooming, and other frustrating interactions due to a particular mobile device.
- Instituting the proper publishing tool takes all the complexities out of responsive design, allowing the technical writer to focus solely on the content.
- With only one set of output, your content is reliant on a canonical URL for each topic, thus favorably impacting your ranking in the search engine results as well as providing consistency in how this URL may be shared and exchanged with other end users.

TONY MCDOW is the founder and CEO of Quadralay Corporation. Tony worked for 12 years in the development of WebWorks Publisher, which was first released in 1994. Since 2004 he has worked with writing teams around the country, seeing firsthand the challenges they face in capturing and delivering knowledge. With the launch of the ePublisher Platform, as part of the WebWorks team, he focused on enabling the publishing process to deliver the next generation experience to end-users, writers, and information architects of all types of organizations. Prior to Quadraley, he studied electrical engineering at the University of Texas at Austin, and obtained an MS in engineering.
The Top 10 Indexing Errors Made by Technical Writers

BY LORNE GRIFFITH | Senior Member

AS A FIRST-TIME JUDGE in a local STC competition some years ago, I was pleasantly surprised by the quality of the entries. Of the five manuals submitted, three were award winners. At the same time, I was astonished by the poor quality of the indexes, which ranged from appalling to merely bad. Many technical communicators, it seems, are confused about what should and should not be indexed, and make common mistakes in organizing and formatting their index entries.

10. Do not index introductory material. Sections such as “About this Manual,” “Getting Started,” and “Who Should Read this Guide”—while often useful in themselves—do not require inclusion in your index. When was the last time you looked up the term “who” in an index to find out whether you were reading the right manual? And if you did want to know who should read this manual, you could turn to the front of book and find the section easily.

My rule of thumb is pretty simple. If the page locator is a single digit, it probably shouldn’t be in the index.

<table>
<thead>
<tr>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>about this manual 5</td>
</tr>
<tr>
<td>getting started 6</td>
</tr>
<tr>
<td>who should read this guide 6</td>
</tr>
</tbody>
</table>

Wrong | Right
9. Do not index the primary product name.
The primary product is the subject of the book that you are indexing. For example, Adobe FrameMaker would be the primary product in a book called *Getting Started With FrameMaker*. You do not need an index entry for “FrameMaker” because the name is implied in the title of the book itself.

**EXAMPLE**

<table>
<thead>
<tr>
<th>FrameMaker</th>
<th>imported graphics</th>
</tr>
</thead>
<tbody>
<tr>
<td>imported graphics</td>
<td>assigning color to 35</td>
</tr>
<tr>
<td>assigning color to 35</td>
<td>converting to monochrome 19</td>
</tr>
<tr>
<td>converting to monochrome 19</td>
<td>cropping parts of 45</td>
</tr>
</tbody>
</table>

Wrong | Right

8. Do not index topics mentioned in passing.
An index is not a concordance, an alphabetical list of all the words that appear in a given document. Rather, it is an alphabetical list of entries—some found in the document and others not—that point to a significant discussion of a topic, not merely a casual reference to it.

Consider the following example: “Like the copy command, the move command can only be performed by a system administrator. To move a file, you . . . ” In this passage, the copy command is mentioned only in passing and should not be indexed. The real topic of the passage is the Move command.

**EXAMPLE**

<table>
<thead>
<tr>
<th>Copy command 25, 31, 46</th>
<th>Copy command 31</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move command 16, 34, 48, 59</td>
<td>Move command 34</td>
</tr>
</tbody>
</table>

Wrong | Right

7. Do not use a double-level entry when there is only a single subentry.
Double-level entries are only required when you have two or more subentries. If you have a single subentry (for example, “files/copying”), the correct format is “files, copying.”

**EXAMPLE**

<table>
<thead>
<tr>
<th>files copying 25</th>
<th>files copying 25</th>
</tr>
</thead>
<tbody>
<tr>
<td>deleting 29</td>
<td>saving 36</td>
</tr>
</tbody>
</table>

Right | Wrong | Right

6. Do not list multiple subentries with the same page number.
Subentries with the same page number should be grouped whenever possible. If all subentries refer to the same page, consolidate them at the main entry level.

**EXAMPLE**

<table>
<thead>
<tr>
<th>order types</th>
<th>order types 25</th>
</tr>
</thead>
<tbody>
<tr>
<td>regular 25</td>
<td></td>
</tr>
<tr>
<td>backdated 25</td>
<td></td>
</tr>
<tr>
<td>kitted 25</td>
<td></td>
</tr>
<tr>
<td>pending 25</td>
<td></td>
</tr>
</tbody>
</table>

Wrong | Right

5. Do not assign page references to both the main entry level and the subentry level.
Page references should always be assigned to the lowest level entries.

**EXAMPLE**

<table>
<thead>
<tr>
<th>files 29</th>
<th>files about 35</th>
</tr>
</thead>
<tbody>
<tr>
<td>as part of directory 19</td>
<td>as part of directory 19</td>
</tr>
<tr>
<td>using 45</td>
<td>using 45</td>
</tr>
</tbody>
</table>

Wrong | Right

The page reference for the main heading (page 29) is confusing. Does it refer to a general overview, definitions or miscellaneous information that the indexer was unable to fit into another category?

To avoid confusion, page references should always go on the lowest-level entries. If a main heading has subentries, the page references should be with the subentries (not on the main heading), and if subentries have sub-subentries, the page references should go on the sub-subentries.

4. Do not index adjectives and adverbs.
Generally speaking, the first term of an index entry should always be a noun or a gerund (that is, a verb ending with “ing”). Do not use adjectives, adverbs, or prepositions as the first term of an index entry.

**EXAMPLE**

<table>
<thead>
<tr>
<th>other tools 29</th>
<th>files, unable to find 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>when to use templates 45</td>
<td>templates, when to use 45</td>
</tr>
<tr>
<td>unable to find files 13</td>
<td>tools (other) 29</td>
</tr>
</tbody>
</table>

Wrong | Right

3. Do not double space or use excessive space before or after subentries and subsubentries.
Excessive line spacing between each subentry can double the length of the index, making the manual longer, heavier, and harder to handle. Not only is it a total waste of trees, it also reduces retrievability because the poor reader has to flip through twice as many pages to find the entry they are looking for. It is equivalent to double spacing a list or a telephone directory.
1. Do not omit the index!
The only thing worse than a bad index is no index at all. Some will claim that full text searches are quite satisfactory and eliminate the need for indexes. Nothing could be further from the truth. Full text searches suffer from the following limitations:

- They do not work at all if the user searches for the wrong term. For example, if the user searches for “maternity leave” or “pregnancy leave” and the topic is discussed as “family leave.”
- They retrieve every occurrence of the search term, including trivial ones of no interest to the user.
- They point the user to the page containing the search term, but not to the actual paragraph or phrase.

Indexes, on the other hand, offer the following advantages:

- Their concisely worded entries are much easier to scan than the long wordy sentences retrieved in a full text search.
- They support “See Also” references that point the user to related topics.
- Their hierarchical structure with nested subentries and subsubentries shows the relationship between topics in a way that the “flat” structure of a full text search never can.
- When a topic has multiple subentries, the user discovers information about a topic that he or she didn’t know. In other words, when searching for A, the user may discover B and C as well.

LORNE GRIFFITH is a freelance technical writer working out of Toronto, Canada. He has worked in the field for over 20 years, has won two STC awards, and has served on the jury of local competitions. Technical writing allows Lorne to indulge in his two special interests: indexing and graphic design.

EXAMPLE

<table>
<thead>
<tr>
<th>imported graphics</th>
<th>imported graphics</th>
<th>imported graphics</th>
</tr>
</thead>
<tbody>
<tr>
<td>assigning color to 35</td>
<td>assigning color to 35</td>
<td>assigning color to 35</td>
</tr>
<tr>
<td>converting to monochrome 19</td>
<td>converting to monochrome 19</td>
<td>converting to monochrome 19</td>
</tr>
<tr>
<td>cropping parts of 45</td>
<td>cropping parts of 45</td>
<td>cropping parts of 45</td>
</tr>
<tr>
<td>importing and updating</td>
<td>importing and updating</td>
<td>importing and updating</td>
</tr>
<tr>
<td>element definitions 13</td>
<td>element definitions 13</td>
<td>element definitions 13</td>
</tr>
<tr>
<td>formats 16</td>
<td>formats 16</td>
<td>formats 16</td>
</tr>
</tbody>
</table>

Wrong | Right | Right

Likewise, to save space and improve retrievability, avoid single-column indexes.

2. Do not use general verbs such as “using xyz” as main index entries.

It is a general rule in technical writing that headings should contain a verb. Sometimes the verb is significant (for example, “Importing graphics”), but often it is not. When the verb in the heading is not specific and meaningful, do not use it as a main entry in your index.

EXAMPLE

<table>
<thead>
<tr>
<th>understanding FrameMaker 29</th>
<th>FrameMaker 29</th>
<th>FrameMaker, understanding 29</th>
</tr>
</thead>
<tbody>
<tr>
<td>FrameMaker 29</td>
<td>MS Word 16</td>
<td>MS Word, using 29</td>
</tr>
<tr>
<td>using MS Word 16</td>
<td>Visio 10</td>
<td>Visio, using with 10</td>
</tr>
</tbody>
</table>

Wrong | Right | Right

EXAMPLE (1. Do not omit the index): the user wants to know more about spell checking in Adobe FrameMaker

<table>
<thead>
<tr>
<th>Spell-checking</th>
</tr>
</thead>
<tbody>
<tr>
<td>See also dictionaries; document dictionaries; personal dictionaries</td>
</tr>
<tr>
<td>canceling 77</td>
</tr>
<tr>
<td>capitalization of text when 75</td>
</tr>
<tr>
<td>changing options for 74</td>
</tr>
<tr>
<td>conditional text 226</td>
</tr>
<tr>
<td>current page 73</td>
</tr>
<tr>
<td>documents with different languages 70</td>
</tr>
<tr>
<td>hyphenated compound words 74</td>
</tr>
<tr>
<td>hyphenation and 72</td>
</tr>
<tr>
<td>languages for 76</td>
</tr>
<tr>
<td>specific text 79</td>
</tr>
<tr>
<td>text insets 78</td>
</tr>
<tr>
<td>text to ignore when 82</td>
</tr>
</tbody>
</table>

Hierarchical structure and concise wording point the user directly to the desired information | “Flat” structure, wordy entries and retrieval of irrelevant topics may require further searching by user

SUGGESTED READING

For more tips on good indexing, check out Indexing, A Nuts-and-Bolts Guide for Technical Writers by Kurt Ament.
STC Announces Membership Discounts and Recruitment Incentives, Renewal Policy Changes, and New Dues Rates

On-Time Registration Discount and Recruitment Incentives
To encourage timely renewals, the STC Board of Directors approved a discounted rate of $195 for members joining or renewing at the Classic Membership level on or before 31 December 2012. With the addition of one chapter ($25) and one SIG ($10), the total cost of membership for individuals joining or renewing at the Classic Membership level on or before 31 December 2012 is $230. Dues rates for individuals joining or renewing after 31 December 2012 are outlined below. Participation in membership recruitment programs, such as the Member-Get-a-Member campaign, will make it possible for members to receive additional credits on their 2013 dues.

Changes to Renewal Policy
Based on member feedback, several changes have been made to the STC renewal policy:
- The reinstatement fee for late-renewing members has been eliminated.

<table>
<thead>
<tr>
<th>Membership Category</th>
<th>Dues</th>
<th>Adjusted Dues (Emerging Nations)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classic</td>
<td>$195 (Prior to 31 Dec. 2012)</td>
<td>$50</td>
</tr>
<tr>
<td></td>
<td>$225 (After 31 Dec. 2012)</td>
<td>Add a Chapter: $10 each</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Add a SIG: $5 each</td>
</tr>
<tr>
<td>Gold Education</td>
<td>$425</td>
<td>No Change</td>
</tr>
<tr>
<td>New TC Professional</td>
<td>$160</td>
<td>No Change</td>
</tr>
<tr>
<td>SIG Value</td>
<td>$295</td>
<td>No Change</td>
</tr>
<tr>
<td>Student</td>
<td>$75</td>
<td>$25</td>
</tr>
<tr>
<td>Retired</td>
<td>$145</td>
<td>No Change</td>
</tr>
</tbody>
</table>

- Membership terms are on a calendar-year basis and expire 31 December. Access to 2012 membership benefits (including members-only resources and events and member pricing) will be extended until 15 January 2013.
- Starting January 2013, membership dues will be prorated based on the month a member joins or renews.
- Despite other changes to renewal deadlines, individuals must still join or renew by 28 February 2013 to be eligible to vote in the STC elections.

New Dues Rates for 2013
The STC Board also voted in August to make several changes to the existing dues structure for the 2013 membership year. After 31 December 2012, dues at the Classic membership level will increase to $225. For individuals residing in emerging nations, there will be a reduction in the cost of adjusted dues at the Classic and Student membership levels to $50 and $25 respectively, and community memberships in emerging nations will be reduced to $10 per chapter and $5 per SIG. All other levels of membership dues will remain at the same price as 2012.

Reminder of Deadlines for Awards and Honors
The deadlines for nominations for many of STC’s awards and honors are upcoming. Please see the STC website, www.stc.org, for more information or to find out how to nominate someone.
- Jay R. Gould Award for Excellence in Teaching Technical Communication: 2 November
- Ken Rainey Award for Excellence in Research: 2 November
- Community Achievement Awards: 21 January 2013
- Community Pacesetter Awards: 25 March 2013

28 February 2013 to be eligible to vote in the STC elections.
STC Board Approves New Community Funding Model

AFTER REVIEWING THE RESULTS of a knowledge-based governance survey sent to all Society members, the STC Board of Directors voted to approve a new community-funding model described as a “Partial Pass-Through.” Under this model, STC communities will receive funding based strictly on the number of members in a chapter or SIG. During the budgeting process, all communities will receive a fixed amount of funding per member—$15 per chapter member and $4 per SIG member—regardless of projected expenses and income, or estimated reserves at year end. All funding under the newly adopted model will be contingent upon a budget submission by the 31 October deadline and will take effect for the 2013 membership year.

Society Treasurer Aiessa Moyna presented the results of the survey to the board members and senior staff assembled for the monthly Board of Directors teleconference. Moyna indicated that the survey results were consistent with what Society leadership has been hearing from community leaders and members in recent months. While more than 200 members based in the United States, Canada, Europe, and Australia responded, the overwhelming majority of responses (about 77%) were U.S.-based. Some individuals outside the United States had expressed a strong preference for one model and had asked the board to consider instituting separate models for United States vs. international chapters, if the survey results supported it. An analysis of the data shows that a majority of respondents from all regions prefer the Partial Pass-Through model.

Other highlights of the survey include:
- Results for international respondents were directionally consistent with results for all respondents—there were no significant disparities.
- Overall, there was a strong preference for Option 2, the Partial Pass-Through model. More than 50% of all respondents said they agree or strongly agree that this is an appropriate model for communities.
- There also was strong opposition to Option 4, the Community Managed model. About 64% of all respondents said they disagree or strongly disagree that this is an appropriate model; more than 64% of non-U.S. respondents said they disagree or strongly disagree that this is an appropriate model.
- The next-most-popular alternative was Option 3, the Flat Funding model. About 45% of all respondents said they agree or strongly agree that this is an appropriate model.
- Overall, there was strong opposition to Option 4, the Community Managed model. Nearly 80% of all respondents said they disagree or strongly disagree that this is an appropriate model; more than 64% of non-U.S. respondents said they disagree or strongly disagree that this is an appropriate model.
- There also was strong opposition to Option 1, the (current) Reserves Target model. About 57% of all respondents said they disagree or strongly disagree that this is an appropriate model; more than 64% of non-U.S. respondents said they disagree or strongly disagree.

The knowledge-based governance survey used to inform the Board decision was the latest in a series of efforts by Society leaders to engage and collaborate with STC members in identifying the best funding model for communities. Other outreach efforts included a community webinar, sessions at the 2012 STC Summit, one-on-one conversations with community leaders, LinkedIn and MySTC discussions, and review of the proposed models with the Community Affairs Committee.

If a Member Get a Member...

WITH INCREASED INCENTIVES and the opportunity to pay for your entire membership, there’s no reason for you not to take part in STC’s Member-Get-a-Member campaign. Simply tell your colleagues how you have benefited from your membership in STC and suggest that they visit www.stc.org/membership to learn more about membership and to join.

Then when they join—and why wouldn’t they?—you’ll get $25 off your own dues, more than double the previous incentive. What’s more, we’ve changed the cap from $50 to $225, meaning that if you recruit enough new members you can get a Classic membership for the entire year absolutely free!

You understand the value of your STC membership better than anyone, so reach out to your professional contacts and recruit them to join STC. A large percentage of new members join STC simply because someone invited them—and your invitation can pay off. Reaching out and recruiting a member is easy when you find yourself interacting with colleagues at meetings, online, on the job, or while networking.

New members must list your name in the “Referred by” field of the membership application for you to get credit. This program runs through 15 January, so start the conversation now. STC’s Member-Get-a-Member page (www.stc.org/ngam) has recruiting tips, sample emails to send to colleagues, talking points, and more. Talk to your colleagues about STC—they’ll thank you, and STC will thank you, too, with a lower cost for your own membership.
AMISH PATEL, managing partner of L3ARN, has a real challenge on his hands. L3ARN provides usability, learning, and development solutions for Fortune 500 companies that rely on Enterprise Resource Planning (ERP) software systems, such as SAP, to manage their vast, complex, and always-changing data structures. SAP, in particular, has been a great boon to global companies because it enables multiple users, administrators, business analysts, and, yes, even consumers, to access data through a variety of interfaces—data that can be changed, real time, because time is money, and guaranteeing (in theory) accurate, always-accessible data is absolutely necessary to run a successful business.

The problem, however, and one that Amish and his L3ARN team are taking on, is that SAP usability is difficult and challenging. An SAP might allow, for example, a new employee to be added across the system, but such an action typically takes multiple steps, and those steps take time and also open up the possibility for the kind of error that then is unleashed throughout the system to cause child problems that begat more problems and so on.

SAP, because of how it works structurally, is also very resistant to the typical usability approaches that would have evaluators test and modify a Web or mobile phone screen to make the GUI more usable. Much of the SAP interface is dependent on the application layer, resting between the presentation layer and the database layer, and the application layer isn’t easily customized. Customizations, in fact, are time-consuming and expensive, and often when done they can cause problems. SAPs’ applications are always being upgraded, which is great, but that upgrade often wipes out or conflicts with any customizations done between versions.

SAP has heard enough feedback about this and other usability issues that it is responding now to add in more flexibility to customize interfaces and application settings. But that still, most likely, won’t go far enough, which is where Patel and his company come in. The challenge is big and unique, but I like L3ARN’s approach because it offers lessons and reminders for those of us faced with evaluating and improving the usability of a variety of different products.

L3ARN is focusing on developing software solutions outside the SAP that allow scripts to be run to carry out tasks, such as adding an employee or changing an item’s price on a material list faster, and thus more effectively. It isn’t perfect but is a workaround that displays adaptability and originality. L3ARN is also not just going into companies and telling them what’s wrong with an interface and leaving. Since programmers inside can’t affect changes to correct usability issues without a lot of work (that might get overridden anyway), L3ARN is developing and offering solutions that include user training. Lastly, it is focusing on the use process overall, mapping out how users use applications and where they use them, and it is putting into place mechanisms for gathering data that allow SAP administrators at the companies to monitor transactions and other user data, thereby allowing them to think proactively about what solutions may be implemented, and what impact these solutions may have after implementation. “Realistically, usability is the key for both learning and IT managers so that more training will not be needed in some cases,” Patel said. “In the past, we were unable to offer meaningful solutions, but now through our end user learning experiences and technology we think we can offer a more permanent solution for customers with user specific agile solutions.”

Usability, after all, just isn’t about interface. That’s right. I wrote that. It isn’t just about navigation and content layout. Obviously, a usable product must have an effective interface. No one would ever say that such things, and testing for them, isn’t important. But they’re not everything. In fact, if we move too quickly just to correct the issues we find with them, we forego what I
think is just as necessary, and that is a careful examination of the user experience process.

How did developers think about users when developing the product? How do users use the product? How are users involved in designing the product they will use? Is the process top-down or more user-centric where, even if the core structure can’t be changed, considerations are given for how user needs can be accommodated through other means, such as training and support?

No amount of testing will ever help a system if the process isn’t addressed, because once a new product version replaces the old one the same issues corrected after the fact for the old product will be there for the new one. This is all the more true for those situations where evaluators are given little flexibility to make major recommendations, as is the case for those working in the SAP environment.

A user-centered process goes beyond testing five users by carrying out a series of tasks in a single test. It is more than problem finding. Rather, it assumes problems aren’t finite, so testing just to find them is a zero-sum game—new ones will just crop up, and without an understanding of how things work, how users use the product in the environment, problems will continue.

Really, this is a more ecological approach. An effort is made to understand how everything within the system, users, and product interacts. Eventually, once the system is mapped and the processes of use within it better understood, models are created which allow the usability evaluators to experiment by testing out different approaches, layouts, navigation, etc. The assumption—and this is key—is that a system just can’t be thrown away. Just as we can’t do away with a species, or re-introduce one, in a system because that will have negative effects, we can’t throw out a website or ERP because we don’t like it. Too many times usability has advocated for this because problem-finding was more important than process monitoring and enhancement. If we accept that the system is there to stay, as is the case for the SAP, then we need to find ways to understand how it works and then model solutions for it that involve modifications to the system, not deconstruction. Yes, obvious usability problems that impede use need to be addressed, but not every situation allows for them to be addressed by modifying or doing away with a bad interface. Changing the way use is viewed, how things are made for users, and how users are supported and trained may be highly valuable alternatives for addressing causes as much as effects within the framework of an entire system.
Strategic Information Architecture: The Information User Experience

IN PRIOR INTERCOM COLUMNS, we addressed mobile, multimedia, social media, and business value, all in the context of strategic information architecture. In the January 2012 issue of Intercom on information architecture, we discussed business value yet again and also information models. All of these topics cover dimensions of what we believe to be the nucleus of strategic information architecture: the information user experience, or information experience. Rather than dip into the various facets of user-centered information architecture, in this column we attempt to tie those threads together to directly address information usability and experience as a central responsibility and value of the strategic information architect (IA).

We haven’t tried to be subtle about our belief that strategic information architecture is the source from which all information experience waters flow, but we know that for many technical communicators, this is an uncomfortable thought. Picking up from our assertion in the mobile column:

“But I’m a technical writer, information developer, information architect, content developer, <insert your favorite title here>,” we might be thinking, “not a user experience designer.” We argue that we are, and always were, designing the information experience, no matter what you call us.

In that column, we made the point that mobile is driving a revolution in our focus as technical communicators. While mobile is driving the revolution, it’s a revolution that started about 20 years ago with the emergence of HTML and the World Wide Web. When the Web allowed lots of people access to large amounts of non-linear, hyperlinked, online information, technical communicators began a migration from the back of the crowd to a more prominent position. When the Web became an application delivery platform, and the design of those applications evolved from terse desktop user interfaces into information-rich interfaces, the real revolution began. In the mid-1990s, Andrea began a rant that would become a personal mission, teaching, presenting, and writing on user-centered embedded assistance, information usability, and career paradigm-change topics. Around the same time, Alyson began her career, asking the question, “how come all this cool stuff is so hard for normal people to use?”

Just because the revolution started 20 years ago doesn’t mean that it has to take another 20 years to complete! This revolution must play out on several fronts, and we must be the revolutionaries driving those fronts forward.

The User Experience of Information

Traditional thought separates the user experience (UX)—sometimes understood very narrowly as interaction design—from content, typically pictured as documentation, such as books (or PDFs) and online help. When we consider a given software product, for example, it’s clear that several components dramatically affect the user’s experience with that product, some of which transcend what our community has traditionally consider to be that product’s “user experience.”
interface,” such as the evaluation and purchasing experience.

Occasionally, IAs perpetuate this artificial separation. In our multimedia column, we proposed an alternative (Figure 1) to Marlana Coe’s human factors metaphor for technical communication, which illustrates that there’s potentially a lot of unnecessary noise between the user and the message you are trying to communicate.

We might then think that the experience encompasses the content; the constituent layers of “packaging,” including presentation, delivery, and navigation between the content and the user; and the user’s world (Figure 2).

Because the current information user experience includes so much more than our content (and its constituent “packaging”), we must take a broader view when we consider a model to describe a human factors, usability, or user experience metaphor for technical communication. Users or readers are accessing our content in bits and pieces from a wide spectrum of publishers and delivery channels. In addition, today’s readers evaluate that information in the context of collaborative community content. A better model (Figure 3) reflects not only the variability of the experience but also the fact that the experience is one of many intertwined and overlapping experiences encountered in the user’s world—an ecosystem of experiences encountered as the user focuses on one task or another across a range of tools and information.

In this ecosystem, content still has presentation, delivery, and navigation dimensions, but (hopefully!) the user seamlessly encounters those aspects of the content as they use the content—so seamlessly that they’re

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**Figure 1.** Alternative to Marlana Coe’s human factors metaphor for technical communication.

**Figure 2.** Does the information experience encompass the user and our content?
practically unaware when they do so. We believe that a transparent, facilitating “interface” layer to the content is ideal. In the best ecosystems, those dimensions of the content facilitate that seamlessly integrated experience across our content and content developed by the community. In other words, content is the constant—presentation, delivery, and navigation can and should be adapted based on user need or context. Whew! That’s a lot to expect! Especially when we consider the additional customization and personalization that today’s users are starting to expect from modern information experiences.

Now that we’ve envisioned an entire ecosystem, let’s map the key components of the information experience to a paradigm that we’re all familiar with: the user experience. Simply put, if we think of information as a product—*our* product—then we can create an easily understood mapping to the key components of user experience. UX is a large, complex discipline, but at the risk of offending UX practitioners, we propose that UX is composed of four key components (Figure 4):

**Figure 3. A more realistic depiction of the user experience with modern variables represented.**
The components of the experience map and the process maps.

The bottom line: IAs are the user experience practitioners responsible for the usability of information and the experience in which that information is used. Our work both mirrors and integrates with the work for which our UX colleagues are responsible—that is, product usability—and together, we drive the experience in which our products are used.

Roles, Careers, and Professional Development

If it is true that IAs are the user experience practitioners responsible for the usability of the information and the experience in which that information is used, what does this mean for the IA role on a product team, the IA career, and professional development on the IA career path?

The IA role is an interesting question—we could write an entire article about it, and we touched on the strategic IA role in our first column. In this context, however, reconciling the IA role and the UX role is challenging, and we believe that it should be handled situationally. For example, many IAs—particularly in Web design contexts—are UX practitioners, and in their minds, IA is a UX discipline. In our work context—that is, enterprise technical product documentation—IAs typically emerge from the information development (or technical writing) discipline, not UX. In reality, staffing the IA role is about skills and aptitude, not where you came from or your status on a documentation team. Consider these examples:

- **Example 1:** Your team has a UX practitioner who is skilled in information-related techniques, such as progressive information disclosure and navigation design. Great! You’ve got an IA who is responsible for the information user experience.
- **Example 2:** Your team’s technical writer is masterful with detail and

Figure 4. The four key components needed for user experience.

Figure 5. The four key components of information experience, mapped to the components of user experience.

We acknowledge that the boundaries between the components of the information experience world are more gray than those of the UX world. Our world is less “neat” than UX. However, IAs are concerned with the same issue as our friends in UX: the usable convergence of function, interaction, visual design, and (above all for IAs) content. Although we’ve focused on the design aspect of UX thus far, if we consider the other phases of a comprehensive UX process, we can map the development of the information experience to analysis and validation, as well. The
skilled in communicating complex
corcepts simply, but she struggles
with ambiguity and the big
picture. Great! You’ve got yourself
an excellent technical writer, but
not a good IA.

- Example 3: Your team’s IA
commands a solid knowledge of UX methods and practices, over
and above skill in structuring
information. Great! You’ve got
yourself an IA who is responsible
for the information user
experience and not just navigation
or content structure.

- Example 4: Your team’s UX
practitioner really understands
user interaction techniques but
lacks information architecture
skills. Great! Time to go find an
information architect!

When it comes to career and
professional development, we’re
not going to pull any punches. If
you’re in technical communica-
tion—writer, editor, tactical
information architect, strategic
information architect, whatever!—
you need to build solid IA skills and
become at least semi-expert in UX
methods and practices, particular-
ly user-centered processes like
scenario-based development and
interaction design. Bring together
the practices and methods of UX
and apply them to information:
scenario-based information
development; progressive information
disclosure; information use, content,
and access modeling; and information
user testing. Remember: Consider
your content your product! Your
future depends on it.

Conclusion: It’s All Experience

The thing is, we’ve never really
understood the (occasional) rift
between UX and IA. Yes, we focus
on different things, but it’s all
UX. Or maybe a better way to put
it is this: it’s all experience. All of
these fabulous new information
technologies—particularly some
of the innovations we’re seeing in
mobile environments—continue to
blur the lines between read vs. do,
see vs. touch, consume vs. produce.
These technologies continue to blur
the lines between the various facets
of the user experience. Everything
our users see, do, and touch; every
shift in their understanding and
awareness; every change in their
behavior that comes to be—it’s all
part of the experience. And that
can make it hard to distinguish
who does what (a necessity in
corporate life).

In our perfect world, we envision
a kind of collaboration that starts
first with ideas and only later
moves to implementation. In this
world, the UX practitioners and
the information architects sit down
together and define ideas first: How
do we want to change the user’s
experience? Is that new experience
a doing thing or a knowing thing—or
both? And what’s the best way
to implement that experience?
Sometimes a knowing-related
need is best executed by doing (an
interaction object), and sometimes a
doing-related need requires knowing
(an information object).

In reality, many of these decisions
are made before the work even
begins, because the UX architect
and the IA do not define the ideas
together first. By the nature of their
defined roles, they jump straight
into implementation: “I’m going to
start designing the panels; you start
designing the help system.”

By focusing on the core ideas first
and defining those ideas from the
user’s point of view, requirements
emerge for doing vs. knowing and for
the best way to drive user success:
“Will an action or some information
help the user best?” In all situations,
it’s just experience—whether
the content of that experience is
implemented as a doing thing or a
knowing thing, or more likely, some
combination of the two.

The point here is that interaction
and information are both facets
of the same user experience. Of
course presentation and delivery
vary between interaction and
information, but the modern
user doesn’t see the line between
function and content that we
technical communicators do.
All they see is: “Did I get what I
wanted, or did I just get close to
what I wanted?” Interaction, like
information, is a user experience.
Don’t fear this pressure to expand
your skills into the world of user
experience architecture! You’re
already working in that space, and
many of the core concepts and
skills are transferrable. Embrace this
idea of integrated interaction and
information experience—it’s the key
to relevance tomorrow.
Become one of the first
Certified Professional Technical Communicators™

Why earn your Certification?

<table>
<thead>
<tr>
<th>Leadership Recognition</th>
<th>Professional Status</th>
<th>Professional Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show your employers you are a technical communication leader who is committed to establishing worldwide performance standards for the field.</td>
<td>Join an elite group of professionals who have demonstrated their technical communication knowledge and proficiency.</td>
<td>The educational requirements of certification are one more reason to continuously maintain and upgrade your knowledge. Add certification to your career development plan.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Portable Career Credential</th>
<th>A Sense of Achievement</th>
<th>Experience Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you change jobs, your certification credential travels with you and will enhance your employability and compensation.</td>
<td>Give yourself the confidence to excel at your job.</td>
<td>Certification confirms your experience and competency in technical communication, your commitment to the profession.</td>
</tr>
</tbody>
</table>

The CPTC assessment encompasses broad areas of practice that represent the major activities performed by technical communicators. The certified practitioner demonstrates proficiency in the following areas:

- **User, Task, and Experience Analysis**—Define the users of the information and analyze the tasks that the information must support.
- **Information Design**—Plan information deliverables to support task requirements. Specify and design the organization, presentation, distribution, and architecture for each deliverable.
- **Process Management**—Plan the deliverables schedule and monitor the process of fulfillment.
- **Information Development**—Author content in conformance with the design plan, through an iterative process of creation, review, and revision.
- **Information Production**—Assemble developed content into required deliverables that conform to all design, compliance, and production guidelines. Publish, deliver, and archive.

Employers know that certified practitioners earn more than their uncertified colleagues, because employers find that certified professionals are more likely to be successful hires and valued employees.

Visit [www.stc.org/certification](http://www.stc.org/certification) for more information and to submit your application.
He “would like technical communicators to understand that blind users access content using a bottom-up approach whereas sighted users access content using a top-down approach. In other words, blind users are not able to skim a page visually, which is why it is critical that the content support some type of structure that can be used for navigation, for example, landmarks, heading tags, and so on. If
this structure is not available, then a blind user must work through the content linearly at the lowest level. That is very difficult and slow."

Dan is a senior IT manager at a computer software company. He has had a number of eye issues since childhood, including Retinopathy of Prematurity, numerous retinal detachments, blind in left eye, extremely high myopia and astigmatism, 40% visual field loss in right eye, and myopic macular degeneration. His vision is 20/100 corrected with glasses and distance vision is 20/40 with Ocutek telescopic system.

Dan uses the following technologies in his everyday work:
- ZoomText Reader.
- Amazon Kindle for reading.
- The e-ink technology coupled with the great font size and type selections allow him to read easily for a long period.
- Apple iPad allows for browser pages, PDF files, and email.
- He appreciates the high-quality voice dictation that is available on the iPad.
- Dragon NaturallySpeaking.
- His biggest complaint is with Web designers who are more concerned with controlling the way a page looks and not allowing for changes or honoring the default settings he has set.

Sina is a technology consultant, CTO of a nonprofit, PhD student, and co-founder of a Web design firm. He is legally blind with zero light perception in his right eye and some in his left. He has had limited vision since birth, but his vision got significantly worse at age seven due to physical trauma caused by a tennis ball.

In his daily work, he uses:
- iPhone 4S with VoiceOver
- JAWS and NVDA screen readers on Windows
- Orca screen reader in Linux Gnome
- SpeakUp screen reader for terminal windows
- A Braille display for output, sometimes
- He finds that Web pages are often not accessible due to a lack of compliance with accepted standards. Because simple solutions do not exist, firms may not exert the extra effort to make their products accessible to a wider range of users.

When in need of product help, he rarely uses end-user documentation or online help, relying instead on Google, Twitter, and other social media such as Facebook and LinkedIn. In his experience, “third parties are virtually always better,” especially for accessibility guidance.

He would like technical communicators to consider universal design. Sina says, “Their audience is not limited to whom they think it is, but rather consists of a varying population with varying functional needs and limitations.” As the population ages, people acquire functional limitations; improvements for one user group may “have emergent benefits for all.”

Bob analyzes epidemiological data for the federal government using SAS software. For nearly a decade, rheumatoid and osteoarthritis have inhibited his use of a keyboard and mouse. When his condition is less-well controlled, he relies on Dragon NaturallySpeaking to drive his computer through speech input. In addition to Dragon, he uses an extremely sensitive touchpad. Says Bob, “Clicking is now [my] hardest computer-related ‘act.’” As speech input has become more sophisticated, he not only types by voice but also moves the cursor and manipulates text with voice commands. He uses end-user documentation or online help almost daily.

Holly is an intern for a technical communication firm and works as a reference librarian for a virtual reference chat service called NCKnows. She has been legally blind since birth, with 20/200 vision (extreme nearsightedness) in her left eye and is completely blind in her right eye. In addition, she has profound hearing loss and wears a hearing aid in one ear and a cochlear implant in the other. Just implanted six months ago, Holly says her cochlear implant has “opened a whole new world of hearing for me, and I am able to participate in many situations that I haven’t been able to very well in the past such as movies, groups, lectures, etc.”

To facilitate her computer use, Holly has a 22-inch monitor and she enlarges the font. To avoid eye and neck strain, she also uses the zoom setting on her iPad and holds the device close to her face. Her wish list to improve accessibility of Web pages and software includes:
- Built-in zoom capability. Without that, she must use third-party software, such as ZoomText, or the magnification feature in the operating system.
- Text wrap on websites. When text is enlarged, if it’s set to wrap, the text flows vertically rather than forcing her to scroll horizontally.
- Video captions or transcripts.
- Text equivalents for videos would help Holly because of her hearing loss and also others who cannot listen to audio, such as being in an airport or other noisy setting.

As she’s currently learning DITA, Holly uses Oxygen’s online help once or twice a week and finds it easy to navigate and enlarge. However, search can be difficult.

To advise fellow technical communicators on accessibility, Holly says they need to understand that not everyone has technical knowledge and not everyone can access information in the same fashion. She believes it is important to offer alternative formats when possible.

Accessibility, rather than being a late-stage consideration of information development, instead is an essential of core technical communication skills: audience analysis (who is using my information products to do what?), human factors considerations (how do environmental factors influence my design and the user experience), and flexibility (single-sourcing, liquid design). By widening our concept of our audience, we can increase the usage, relevance, and customer satisfaction of the products we produce.
Ask Me About . . .
Career Advancement through Personal Branding

I recently went to a conference where attendees’ nametags included the phrase, “Ask me about . . .” [then an answer we provided when registering]. What a cool idea, I thought. I’m going to use that at my LavaCon conference!

While I initially just admired their clever way of giving attendees a way to break the ice when networking, my admiration soon shifted to a major career realization: The whole concept of personal branding can be summarized by that simple phrase, “Ask me about . . .”

Before we look at some examples, let’s define some terms.

**Branding vs. Positioning**
According to BusinessDictionary.com, a brand is “a unique design, sign, symbol, words, or a combination of these, employed in creating an image that identifies a product and differentiates it from its competitors.” Think of Kleenex brand facial tissue or Tide brand detergent.

Companies spend billions of dollars a year advertising and building brand recognition so that people will remember and buy their products.

It is interesting to note that in many cases a name-brand product and a no-name generic product are the same product produced by the same manufacture. What matters is that consumers perceive that a brand is better and therefore buy it, usually at a higher price than a non-branded generic equivalent.

Which brings us to the next key concept—positioning. One way to communicate to potential customers about a product or service is to compare it to a better-known product or service. “Stronger than steel,” “Faster than FedEx,” “Cheaper than Walmart” would be examples of positioning.

Notice that in each of the above examples, the phrase contains some aspect of the product or company (quality, speed, price) and then a better-known product or company against which the item is positioned.

**Personal Branding**
OK, so far we have covered branding and positioning. One might say those obviously apply to selling shoes or laundry soap, but what do they have to do with me, the technical communicator? That’s where personal branding comes in. Just as a company creates a brand and promotes why people should buy the product or service, so should you create a personal brand and promote why people should buy your product or service.

In “Tech Comm 2.0: Reinventing Our Relevance in the 2000s” (Intercom, February 2012), Scott Abel and...
“The illiterate of the twenty-first century will not be those who cannot read and write, but those who cannot learn, unlearn and relearn.”

I asserted that technical communicators are in danger of becoming a commodity, a product or service to be acquired for the lowest possible price given an acceptable level of quality. Why? Because many companies do not perceive the value that individual technical communicators bring to their organizations.

And the why behind that? Lack of personal branding!

Personal branding and proper positioning communicate why companies should buy your services and pay the rate or salary you want to be paid.

STC Fellow Andrea Ames, when asked what she does for a living, answers, “I solve business problems.” Not “I’m a technical writer.” Not “I write user manuals.”

While she may actually do those things as part of her job, they’re not the way she approaches her job. And certainly that’s not how she self-identifies or defines her corporate mission.

“I solve business problems.” What a great personal brand! It instantly communicates what she does and why she is valuable.

**Responding to Market Changes**

In their book *Built to Last: Successful Habits of Visionary Companies*, James Collins and Jerry Porras state that all the visionary companies they studied had a trait in common: They all had a history of responding to market changes while staying true to their core values.

Content strategist Sharon Burton’s rebranding story illustrates this beautifully:

The whole reason I got into tech comm was not because I loved to write, it was because I loved being at the crossroads of people and technology and I could make a difference. That’s why I do what I do. When the recession hit and I got laid off, it forced me to reexamine what drives me in this field, what excites me. I realized what was true when I started is just as true today: I love being at the intersection of people and technology.

Unfortunately, writing online help topics just doesn’t excite me anymore. But helping companies adopt a content strategy that gives people the information they need so they can go out and change the world? That excites me!

Our industry is changing. We’re in a content development revolution. Companies don’t just need user manuals anymore, they need social media and webinars, YouTube videos and multi-channel publishing. These are the areas on which companies are spending money, and they need help to do it right.

So the process of me rebranding wasn’t just calling myself by a new title, it included reeducating myself and repositioning myself so I could effectively offer the services that companies need as the very ground beneath them changes.

Alvin Toffler, an American writer known for his works discussing the digital revolution, takes the concept of reeducation a step further: “The illiterate of the twenty-first century will not be those who cannot read and write, but those who cannot learn, unlearn and relearn.”

**Ask Me About ______**

How can you respond to market changes while staying true to your core values?

What can you do that you can promote as a specialized service for which you should be handsomely paid?

Are you an expert in content management systems? A specialist in simplified English? A wiz at creating cascading style sheets?

Or perhaps you make software easier to use through embedded user assistance, or increase sales though better marketing collateral?

What should people ask you about? 

JACK MOLISANI (JackMolisani@ProspringStaffing.com) is an STC Fellow and the president of ProSpring Technical Staffing, an agency specializing in staff and contract technical writers (ProspringStaffing.com). He also produces the LavaCon Conference on Digital Media and Content Strategies (Lavacon.org). Follow Jack on Twitter @JackMolisani.

**The Power of Branding and Positioning**

Philip Morris originally launched the Marlboro brand in 1924 as a women’s cigarette, and advertising was based around how ladylike the cigarette was. When smoking was linked to lung cancer in the 1950s, Philip Morris repositioned Marlboro as a man’s cigarette. Men at the time indicated that while they would consider switching to a filtered cigarette, they were concerned about being seen smoking a cigarette marketed to women. So Philip Morris’s advertising agency decided to use a lineup of manly figures in the ads, starting with a cowboy.

Within a year, Marlboro’s market share rose from less than one percent to the fourth best-selling brand. This prompted Philip Morris to drop the rest of the lineup of manly figures and stick with the cowboy. (Barrett and Mingo)

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**REFERENCE**

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— Melanie Lee, 2012 STC Member

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Organization events across the globe

1 22–26 Oct
The Human Factors and Ergonomics Society (HFES) will hold its 56th annual meeting at the Westin Boston Waterfront in Boston, MA. For more information, contact: HFES +1 (310) 394-1811 info@hfes.org www.hfes.org/Web/HFESMeetings/2012annualmeeting.html

2 24–27 Oct
The American Translators Association (ATA) will hold its 53rd annual conference at the Hilton San Diego Bayfront in San Diego, CA. For more information, contact: ATA +1 (703) 683-6100 ata@atanet.org www.atanet.org/conf/2012/

3 26–31 Oct
The American Society for Information Science and Technology (ASIS&T) will hold its Annual Meeting, with a theme of “Information, Interaction, Innovation: Celebrating the Past, Constructing the Present, and Creating the Future,” at the Hilton Baltimore in Baltimore, MD. For more information, contact: ASIS&T asis@asis.org www.asis.org/asist2012/am12cfp.html

4 27 Oct
The East Tennessee Chapter of the Society for Technical Communication presents the Practical Conference on Communication, “It’s a Wild, Wild Wiki World: What Technical Communicators Do, How They Get There, and Where Next,” at the Rothchild Catering and Convention Center in Knoxville, TN. For more information, contact: ETC-STC poccmanager@stc-etc.org www.pocc.stc-etc.org

5 29 Nov–1 Dec
The India Chapter of the Society for Technical Communication has scheduled their 14th Annual Conference at the Chancery Pavilion, on Residency Road, Bengaluru, Karnataka, India. For more information, contact: STC India conferences@stc-india.org www.stc-india.org/conferences/2012/

6 28–31 Jan
Annual Reliability and Maintainability Symposium (RAMS) 2013 will be held at Rosen Shingle Creek Resort in Orlando, FL, 28–31 January. This year’s theme is “Reliability, the Key to a Better Bottom Line.” For more information, contact: RAMS +1 (603) 863-2832 www.rams.org

7 14–18 Feb
The 2013 American Association for the Advancement of Science (AAAS) Annual Meeting will take place at the Hynes Convention Center and nearby hotels in Boston, MA, from 14–18 February. For more information, please contact: AAAS +1 (202) 326-6450 meetings@aaas.org www.aaas.org/meetings

8 3–7 April
The American Society for Information Science and Technology (ASIS&T) will hold the IA Summit in Baltimore, MD. For more information, contact: ASIS&T asis@asis.org www.asis.org/iasummit.org/

9 14–17 April
The International Society for Performance Improvement (ISPI) will hold its Performance Improvement Conference at the Silver Legacy Resort in Reno, Nevada. For more information, contact: ISPI +1 (301) 587-8570 conference@ispi.org www.ispi.org/AC2013

10 17–19 April
The American Society for Indexing (ASI) will be holding its annual conference at the Hotel Contessa in San Antonio, TX. For more information, contact: ASI conference@asindexing.org www.asindexing.org/

11 5–8 May
The Society for Technical Communication celebrates its 60th anniversary with its annual Technical Communication Summit. The 2013 Summit takes place in the Hyatt Regency in Atlanta, GA. For more information, contact: STC stc@stc.org http://summit.stc.org

F.Y.I. lists information about nonprofit ventures only. Please send information to intercom@stc.org.
Walking in Time

BY JAMES C. HESS | Member

TECHNICAL WRITING EMBODIES opportunity and embraces challenge—the opportunity to excel in communicating clear, concise, and complete information through structure and organization, and the challenge of demonstrating the value of such efforts.

But such pursuits come with stress, and the need for an outlet becomes an absolute.

Several years ago I was in a situation where success was commonplace. But the afterglow was short-lived because of those who failed to comprehend my worth.

Needing a reprieve, I consulted with a friend who offered an interesting proposal: fresh air and physical exercise. All I had to do was carry a pair of binoculars and watch some birds.

Initially I declined. Bird-watching was for . . . older people. As I thought about it, though, I decided to do it, and excitement was mine when I was told which birds to look for: Aquila chrysaetos, the Golden Eagle.

The first trip to see the bird of prey was physically demanding. Before long I had sweat in my eyes and my heart was pounding. As I dropped onto a boulder to rest, a shadow passed overhead. I twisted around and watched as a Golden Eagle circled, the sound of the wind rushing through the wing tips.

For the next decade, I made pilgrimages to see the eagles and watched as they defied gravity by riding thermal currents. I smiled when a small white head was seen in the nest and was saddened when I learned the weak did not survive, recording it in a notebook that accompanied the binoculars and a camera.

At the height of my delight, I was informed my efforts were no longer needed.

Two months later I was contacted by a group who knew of my work and asked to resume my pursuits on their behalf, involving another nest at another location. The first year at the new site one chick was born and successfully fledged. The second year saw two chicks, which survived to adulthood. The third year the experience changed dramatically.

As one year became the next, winter arrived, bringing snow. The trail I followed was buried, and the terrain seemed impassable. The temperature read zero. There was no wind, the sky was cloudless, and the whiteness of the snow suggested infinity.

After a mile’s worth of snowshoeing, I paused. A breeze from the mountains made desiccated yucca shiver, producing sounds like glass chimes.

Then something heavy beyond the rise crunched the snow. In the relative quiet the sound was amplified, and my pulse quickened. I took a dozen steps toward the rise and paused. The snow crunched again and a deep huffing followed. Common sense tried to get my attention, but insatiable curiosity won. Advancing a dozen steps at a time, and stopping to listen, I eventually reached the back side of the rise.

Over the years I have made an effort to read cautionary tales about self-styled outdoor types who failed to respect nature’s wrath and paid the ultimate price. As I considered my situation another huff was heard. I took a deep, quiet breath and resolved to proceed.

At the top of the rise there was fresh track in the snow, initially parallel to me, then perpendicular, leading away. I followed with it my gaze and saw the cause. Bison bison, the American Bison.

We stared at one another. Momentarily it resumed pushing at the snow to get at the grasses that protruded.

The land I stood on was once home to Native Americans. Evidence of their presence exists in teepee rings a few miles away. The land I was on was once home to pioneers who came for opportunity and sought challenge. Remains of their presence are found throughout the property—fallen fences of barbed wire and rotting cottonwood.

In this place, histories converged in the form of the great beast before me, its hairy pelt dark against the white snow.

As it did a familiar cry in the sky, I looked up and saw the Golden Eagle. Experience has taught me that the appearance of the great bird indicates plans for the next generation are underway, that the future awaits all.
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