

Actions Speak Louder Than Words: Usability Testing for Technical Communicators

By Susan Miller, *Member, Central New York Chapter*

You think you know how your audience uses your documentation product. You've done surveys. You keep in touch with customer support. Maybe you've even talked directly to your customers. Of course, you follow design rules. No one is complaining (as far as you know).

It's the perfect time to conduct a usability test for your documentation product. In fact, at any stage in your product's life cycle, usability testing can give you information that other customer feedback methods can't.

What is Usability Testing?

Usability testing is the process of examining how users work with a product, such as a web site, manual, or online help. First, you determine what you want to know about the product. Next, you create a test to help you answer your questions. Then, you select users from your target audience to take the test. You run the test, carefully observing the user's actions for each task. Finally, you analyze your observations and make changes to improve your product.

Why Conduct a Usability Test?

The greatest strength of usability testing is that you, the technical communicator, are meeting and observing actual users. You are removing the distance between you and your audience, something that a survey or even an interview cannot completely do.

Observing users is crucial because what you assume about user behavior and even what users report about their behavior is unreliable. For example, a user may say he knows how to use an online help feature when he's too embarrassed to admit that he doesn't. Or a user may say that she can easily find information on your web site, but forget that it took her some time to figure out your information structure.

How to Conduct a Usability Test

Some people think of usability testing as the realm of specialists in laboratories. While it's true that quantitative testing requires more expertise and users because it involves measurements, qualitative testing can provide excellent insights just through the observation of users. You can design and run a qualitative usability test by following these steps:

1. Determine what you want to know.

Brainstorm general and specific ideas about what you want to observe. How easily are users navigating your new web site? Do users choose a paper manual or online help to learn a new procedure? Consider creating a database or spreadsheet to track questions for future tests, particularly if you work with other technical communicators.


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STC's 51st Annual Conference Baltimore, Maryland, May 9-12, 2004

STC's annual conference is the world's largest gathering of technical communicators. Among the many highlights of the conference are educational sessions, workshops, vendor exhibits, and displays of the winning entries of the Society's international competitions. Technical communication professionals also benefit from numerous networking opportunities and employment resources.

For more information, please visit www.stc.org/conferences.asp. 

Director-Sponsor's Corner

The director-sponsor is a member of the board of the Society, elected by all the members in one region. The director-sponsor acts as a liaison between the members in the region and the Society, and as a mentor and coach for chapter leaders.

We are in Region 1 and Jon Baker, senior member in the Boston Chapter, is our director-sponsor. You may contact Jon at jbaker2525@earthlink.net 

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Mission: *Creating and supporting a forum
for communities of practice in the
profession of technical communication*

President's Message

The new year has arrived and if you are like me you are making your New Year's resolutions. Many of us make resolutions like losing weight, exercising more, eating a low fat diet, taking time to relax, or volunteering. We hope when we make these resolutions that we will follow through with them and become more like the people we aspire to be. Consider adding to your list of resolutions volunteering to help CNY STC this year! While volunteering you also expand your skills and network of contacts, and find support from other professional technical communicators. Here are a few ways you can help CNY STC:



Roberta J. Alderman

- Assist our program director in finding locations to hold meetings or workshops
- Give a presentation at a meeting
- Notify our employment manager about job opportunities
- Assist in the Public Relations campaign
- Recruit new members, bring a friend to a meeting
- Write an article for the newsletter:
 - A Software review
 - A Book review
 - Trends in the technical communication profession
 - Job hunting strategies
 - Your personal experience in the technical communication profession

As you can see, your help does not have to be grand or time consuming. Every little bit helps the chapter grow stronger. If you can do any of the projects listed above or have other suggestions, please contact me at raldermn@twcny.rr.com.

Roberta J. Alderman
President, Central New York Chapter 

Editor's Message

The New Year has arrived! Ring in 2004 with a renewed commitment to your STC chapter. We have an exciting year planned, and I think we're all looking forward to injecting some life and growth into the CNY chapter.

One great way of making that happen is to become an active member. Get the full value of your membership. Attend meetings, contribute to the chapter... contribute to your newsletter. Maybe there is something you've wanted to read, and you've found it helpful. Write a book review! Do you have a special interest in all things grammar? You are not alone! We are technical communicators – write to us about it in our newsletter!

In this issue Susan Miller provides an overview of usability testing, and guides us in our ongoing quest to write usable, quality documentation. Also in this issue, we meet Mary McIver Puthawala. Mary is relatively new to the technical communication field, and has quickly become a respected medical writer in the Binghamton area.

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Editor's Message

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Read a review of our November and December meetings on pages 4 and 5. If you couldn't be there in person this might just be the next best thing. Turn to page 6 for a preview of our January and February meetings.

Happy New Year!

Teresa Washburn

Co-Editor of PrintQueue 

Actions Speak Louder Than Words:

Usability Testing for Technical Communicators

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2. Create the test.

First, determine how long a user will spend taking the usability test, including time for you to debrief the user. Then select several questions from step one, and design a task to answer each question. Specify what determines a successful or completed task, such as a length of time or a particular result.

For example, to see how easily users navigate your new web site, you could ask them to find a piece of information on the web site. The task is successfully completed if they find the information in less than one minute.

3. "Test" the test.

Before you present the test to actual users, you should always run the test with some volunteers, such as co-workers. These practice tests show you whether the test tasks are providing the information you expect and need. Remember that the volunteer testers should match your target users as closely as possible. For example, if you are testing a new web site, use a volunteer who is unfamiliar with the web site.

4. Select users from your target audience.

Choose users according to the purpose of your test. For some tests, you may only want to observe people who are new to your product, while for others you may want people with varying levels of experience. Whatever your requirements, you only need to test with about five users, unless your product has several very distinct types of users (see *useit.com: Jakob Nielsen's Website*, <http://www.useit.com/alertbox/20000319.html>).

5. Run the test.

Ideally, two people should work together to run the usability test: a tester to explain the process and assist the user, if necessary, and an observer to take notes on everything that happens. The tester may encourage the user to talk out loud during the test to better understand what the user is thinking and doing. One or both people may debrief the user after each task or at the end of the test to clarify observations.

How to Manage Your Observations

Watching users work with your product opens your mind to the possibilities as well as the problems. Keep track of this information in a database or spreadsheet according to categories. For example, problems that can be easily fixed might be listed as action items, while more complicated findings might be listed as future items. To better understand your observations, review your user profiles and test tasks. Consider testing for the same problems in a new way. If possible, modify a prototype of your product and conduct another usability test on the prototype.

Usability testing is an ongoing process, like any customer feedback method. It's also the method in which your customers' actions truly speak louder than any words.

Resources


James Hom's Web Site: <http://jthom.best.vwh.net/home.html>

STC Usability SIG Web Site: <http://www.stcsig.org/usability/index.html>

useit.com: Jakob Nielsen's Web Site: <http://www.useit.com>

Coe, Marlana. *Human Factors for Technical Communicators*. John Wiley & Sons, Inc. New York, NY. 1996.


Hackos, Joann and Redish, Ginny. *User and Task Analysis for Interface Design*. John Wiley & Sons, Inc. New York, NY. 1998.

Rubin, Jeffrey. *Handbook of Usability Testing: How to Plan, Design, and Conduct Effective Tests*. John Wiley & Sons, Inc. New York, NY. 1994. 

Complimentary Membership for Nonmember Conference Attendees

Nonmembers who register at the full conference rate for STC's 51st Annual Conference, to be held May 9-12, 2004, in Baltimore, Maryland, will be invited to join STC—free—for the remainder of 2004. The STC office will include an application for a complimentary membership with the conference registration confirmation receipt letter.

A nonmember can return an application to the Society office by mail or fax; a drop box will also be available at on-site registration at the conference. The deadline to return the application to the STC office by mail or fax is June 30, 2004. Please note that the sooner nonmembers forward their applications, the sooner they can take advantage of STC's many services and benefits.

(reprinted from Tieline January 2004, Volume XVII, Number 1) 


Member Spotlight: Mary McIver Puthawala

By Teresa Washburn

I recently had the opportunity to speak with CNY Chapter member Mary McIver Puthawala. Mary has been a member of the CNY Chapter for 2 years, and a Technical Communicator for about 3 ½ years. Mary was a freelance fiction writer before transitioning in to the field of technical communication. “**That** was a terrible economic decision!” Mary feels that fiction writing is much like technical writing, in that you must write readable, marketable material. Mary’s sister-in-law had told her for years that she could move in to the technical communication field and make better money. Mary finally agreed to take a stab at it and has been a technical communicator ever since. She would like to write fiction again someday, but the compensation just isn’t there like it has been in technical writing. Her first assignment was to write the history of Apple Computers in 750 words (not an easy feat!), then she wrote the history of Microsoft in 750 words, then she went on to write biographies of computer professionals. Mary started to think that technical communication and her were a good match. “I love the research involved in Technical Writing. It’s something that I’m very interested in.” Word got around, and before she knew it companies were calling her telling her that they were looking to hire a writer.

Mary has a degree in nursing, so it was natural to specialize in medical writing when she started her own writing business. One of Mary’s current projects is writing for a new magazine called **Healthy Life**, which is a free quarterly magazine. Healthy Life is a patient information booklet, which helps the community learn more about local Doctors.

Mary would like to be able to attend more meetings in the chapter, but it can be challenging this time of year since she lives in Binghamton. “I’d like to network, socialize, etc. with other technical communicators. I recently had to write **and** produce a project, and since I’ve never had to go to print before it would have been nice to bounce my ideas off of other professionals that have been faced with the same issues.”

We hope to see Mary at upcoming meetings, but in the meantime, visit Mary’s website for more information about her business: www.mmpcom.com. 

November 21, 2003 Meeting Notes

by Andrej Miling, *Member Central New York Chapter*

Topic: Online Portfolio Workshop Review

Presenters: Christie Brower, Marketing Director at GPO Federal Credit Union and Russell Kahn, Chair of the Communication department at SUNY Institute of Technology (SUNYIT)

The CNY STC held a workshop on designing and creating the front end to an online portfolio using a Flash “Splash” page and Acrobat PDF. The workshop was held at SUNY Institute of Technology in Marcy on Friday, November 21. Adminstrating the workshop was Russell Kahn, Chair of the Communication department at SUNYIT, and Christie Brower, Marketing Director at GPO Federal Credit Union in New Hartford and a recent graduate from the college.

One of the greatest advantages for having an online portfolio is its accessibility. Your work is stored as PDF digital files on a website. Employers can open or download a piece of work from anywhere, anytime. It is also a great tool to self-promote and demonstrates your ability to adapt your work to the user’s needs.

Participants learned how to structure their portfolio by categorizing their skills. For example, writing, multimedia, and design are three common categories. Three or more examples of their work would be placed in each category. In addition, participants decided on a site “metaphor”, which is to say how will the site behave? Would it be *visual* (image oriented), *organizational* (structured by text-based information), or *functional* (a combination of images and text)?

After drawing a page mock-up, participants began to create their “splash” page using Macromedia Flash and following a set of instructions. A splash page is an interactive home page to a website using animation. Macromedia Dreamweaver would be used to finish the remainder of the online portfolio in HTML, complete with project descriptions and personal information. Lastly, administrators demonstrated how to convert projects to Acrobat PDF using an Acrobat Writer program.

More and more you will find technical communicators creating online portfolios. While print portfolios are still a priority for demonstrating work, online portfolios are the greatest means to showing work to a large or small audience quickly, economically and professionally.

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November 21, 2003 Meeting Notes

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Resources

Bhargal, S., Holm, P., & Adnani, N. *Flash 5 Studio*. Berkeley, California. 2001.

Kinkoph, S., & Wooldridge, M. *Master Visually: The complete visual reference*. New York, New York. 2002.

Lynch, P.J., & Horton, S. *Web Style Guide: Basic Design Principles for Creating Web Sites* (2nd ed.). New Haven, Connecticut. 2001.

Shuman, J., & Lindsay, J. *Macromedia Flash MX*. Boston, Massachusetts. 2003.

Ulrich, K. *Macromedia Flash MX for Windows and Macintosh*. Berkeley, California. 2002.

Online Portfolio Websites

Portfolios.com: <http://www.portfolios.com>

Virginia Tech students' online portfolios and websites: <http://teched.vt.edu/html/MainPortNsites.html#Portfolios>

Christie Brower's Online Portfolio: www.sunyit.edu/~browerc/index.html

Cory Phillip's Online Portfolio: www.techwritercor.com

A Flash-based site on color theory
<http://www.mundidesign.com/presentation/index2.html>

PDF Creation Online
www.gohtml.com/convert_pdf.asp

Educational Opportunities

STC Telephone Seminars Schedule

January 28, 2004 1-2:30 PM ET

Demonstrating the Value of Technical Communication Products and Services

Presenter: Saul Carliner

February 11, 2004 1-2:30 PM ET

Don't Make Me Do That!: Making Learning Fun

Presenter: Lance Gelein

February 26, 2004 1-2:30 PM ET

Designing Web Applications

Presenter: Whitney Quesenbery

More details about the seminars are available on the STC Web site at www.stc.org/seminars.asp

December 18, 2003 Meeting Notes

by Andrej Miling, *Member, Central New York Chapter*

Topic: Tour of Image Press a digital prepress service bureau

Presenter: Chris Arnone, President of Image Press

The CNY STC was given a tour of Image Press by Chris Arnone, its President. Image Press is a digital prepress service bureau located on Erie Blvd in Syracuse. Their services include, digital prepress, transit/vehicle graphics, trade show events preparation, mounting/laminating, and large format printing/point of purchase, which are backlit displays, floor graphics, banners, and fine art reproductions.

The digital prepress works entirely with PDFs by utilizing Prinergy Connect, an industry recognized workflow solution. Being in business for more than ten years, the Image Press continuously invests in new equipment to provide the best quality and service to clients. Their high resolution drum scanning, 8-up drum film Imagesetter, and Kodak Approval XP-4 proofing system produce high quality color accurate proofs and film, and they still do traditional table stripping and blueprint proofs. Although production on Macintosh computers is preferred, the Image Press can work on a PC platform.
www.theimagepress.com

Book Review

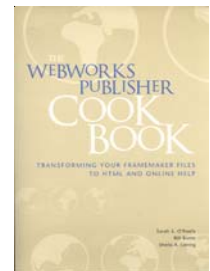
by Roberta J. Alderman, *President, Central New York Chapter*

The WebWorks Publisher Cookbook: Transforming Your FrameMaker Files to HTML and Online Help
By Sarah S. O'Keefe & Sheila A. Loring

The Cookbook is a well written, easy to follow, and complete guide to WebWorks Publisher 6.0, a powerful tool which creates HTML, XML, JavaHelp, and other online formats from FrameMaker files.

Chapters 2 through 4 explain how to choose a template, structure content and set up projects. Chapter 5 has detailed information about mapping FrameMaker tags. Chapter 6 through 15 reviews the various templates and how to customize the templates. Chapters 18 through 20 provides troubleshooting tips.

In addition, printed scripts for customizing templates are provided and readers get access to code listings on the Scriptorium Publishing web site. The Cookbook helps you use WebWorks to implement a true single-sourcing environment.



CNY Job Queue

Employers, please send notices of job openings to our employment manager.

Members, ask our employment manager to email announcements of job openings. Visit the www.stc.org and <http://www.cnystc.org/employment.htm> sites for online job posting or articles.


Contact our employment manager, Teresa Washburn, teresa_washburn@yahoo.com. 

Network Queue

Rochester Chapter STC. Contact Judy Shenouda, jesheno@aol.com, for information about meetings. Or visit the web site <http://www.stcrochester.org/>.

Rochester SGML/XML User Group. For locations and dates, visit www.RNYSXUG.com. 


STC's 51st Annual Conference

STC's 51st Annual conference will be held in Baltimore, Maryland, May 9-12, 2004. For more information, please visit www.stc.org/conferences.asp. 

CNY STC *PrintQueue*

108 Green Apple Lane
Minoa, NY 13116

Rochester Chapter STC 45th Annual Conference

Rochester Chapter STC 45th annual Conference *spectrum* 2004 will be held in Rochester, New York, March 26, 2004, at the RIT Inn and Conference Center. For more information, please visit <http://www.stcrochester.org/> 

CNY STC Meeting Notice

January

Topic: XML for Publishing

Speakers: Dorthy Hoskins, President of Textenergy LCC www.textenergy.com and Barbra Shank

Date: January 15, 2004

Time: 6:00pm

Location: Science and Technology Bldg at Syracuse University

February

Topic: Branding and the Technical Communicator

Speaker: Bill Annios

Date: February 19, 2004

Time: 6:00pm

Location: Sensis Corp., 5793 Widewaters Pkwy, Dewitt, NY 13214

For directions or meeting information contact Tim Voorheis at voorheis@a-znet or Roberta Alderman at raldernm@twcny.rr.com - 315.427.7406 