

design matters

Summer 1997

Our Job 1 is...

by Ruth Glaser

Focus on Job 1. That's the message Information Engineer John Bowie carried at this year's STC Annual Conference. Job 1 for most people is not using software (or other products we document). Job 1 is something else entirely, like treating patients, selling merchandise, or creating documents. Unfortunately, in order to do Job 1 we often must use software that was designed as though our primary job was to use software.

Michael Albers, in a paper published on the interact@toronto.ca CD, stated, "People sitting before a computer program don't ask 'how do I use this Frame option?' they ask 'is there anyway [sic] to get this block of stuff over there?' " Using a Frame option is not Job 1.

The impact of these ideas on information design is obvious, but often overlooked. It is something that we must not forget, as engineers and other techies hand over reams of information. The bottom line is that we must not create end-user documentation from a system perspective. We must not create

documentation based on the whiz-bang features the engineers developed. We have to answer the questions that the user is going to ask, rather than provide the descriptions of the system the techies provide or we create.

Sounds rather fundamental, right? Consider this experience I had in the "Designing an Online Help System Before the User Interface is Done" workshop at the conference:

We were given the task of developing an online help plan for an email system before the user interface was complete.

The product would run in a Windows platform. Our imaginary target users had used Windows before, but were unfamiliar with an email system.

The idea was to create the shell of a help system, mapping out the structure, topics, and jumps. We would fill in the detail as it became available. We decided to make a list of the things a user would typically like to do with email. We quickly moved from "send a message" and "read a message" into murkier waters.

We have to answer the questions that the user is going to ask

One group member suggested an email user would like to send the same message to multiple people. But instead of expressing that task in terms of what the user needed to do, several group members insisted that users would need to "manage a mailing list."

What? When you sat down for the first time with your email system, did you think, "HmMMM. I need to send a message to Bob, Mary, and Sue. Now how do I manage a mailing list?" Doubtful.

We had slipped from answering the user's questions and assisting the user in accomplishing Job 1 to documenting the features of a system. That may be acceptable for an engineer, but it's not for us. We have to anticipate questions the user is going to need answered to successfully do Job 1.

While this premise is fundamental, and the conference presenters repeatedly reinforced this idea, it's a concept that is difficult to consistently and effectively practice. So, as we search for ways to enhance information design, we should also remember that **our** Job 1 is to help our users accomplish **their** Job 1.

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The newsletter of the STC Information Design SIG

Toronto!!

SIG Stats

The Information Design FAQ

ID SIG Goals

Our First Conference

by Cheri Taylor, ID SIG Manager

Another first for us! Many hours went into making the Information Design SIG's presence visible at the Toronto conference. Our debut was a success, and we accomplished quite a lot. Beth Mazur and I attended the SIG Leadership Day as well as the SIG Managers meeting and learned lots of useful stuff about running a SIG. We look forward to our first full year as a SIG!

A special thank-you to all the following people:

- Everyone who attended the ID SIG business meeting (28 of you!).
- Our SIG Luncheon table hosts: Mike Sharp, Melanie Futrell, Mike Albers, and Cheri Taylor.
- Karen Schriver for hosting the ID SIG Forum on very short notice (and for selecting the wonderful Thai restaurant on Monday night!).
- Beth Mazur for preparing the various conference materials and helping with our conference activities.
- And to everyone who stopped to let us know that you were glad that our SIG now exists ... we greatly appreciated the comments!

Conference Highlights

Our summer issue is meant to share conference activities with SIG members who weren't able to attend. The "official" SIG activities I want to specifically mention here included the following:

- SIG Luncheon: 50 folks showed up for lunch with the ID SIG. Fortunately, we were able to take over two extra nearby tables!
- SIG business meeting. There were 28 attendees. After introductions and an overview of the agenda, we had a short recap of our SIG activities and went over our other volunteer positions. We spent the rest of the meeting brainstorming potential ID SIG goals and activities. We also found out that we lucked out in our draw for the business meeting ... Tuesday at lunch is an excellent choice (and Beth is still sorry that she had only bought pizza for 16!!).
- On Monday night, a group of 9 people interested in information design met for dinner at the Golden Thai restaurant and thus a new tradition was born ... the ID SIG dinner meeting! See the note elsewhere in this newsletter for the next SIG dinner to be held during the joint SIGDOC/IPCC conference in October.

As far as next year goes, we hope to sponsor an ID SIG progression in addition to all of these other activities. See you in Anaheim!

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Design Matters

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Submissions

We welcome submissions from SIG members for publication. Submissions via email are appreciated. Please send to mazur@maya.com.

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Toronto!!

edited by Marilyn O'Leary

SIG member Marilyn O'Leary collected a number of snippets from conference attendees related to their experiences at the Toronto conference. This article is an edited version of Marilyn's correspondence. SIG member names are indicated in italics.

About the conference

Bill Sullivan: I heard lectures by such well-known (in our field) authors as Edward Tufte and William Horton. I got to meet Karen Schriver (sorry I missed her sessions) and tell her how much I enjoyed her book *Dynamics in Document Design*. As a matter of fact, I attended a session by Ginny Redish.

At the opening night cocktail party, Marie Myers (Iowa State University) was kind enough to introduce me to Beth Mazur. At the Special Interest Groups luncheon, I sat at a table with such SIG members as documentation analyst Melanie Paschetag Futrell from Texas, technical communicators Michele Gannett from Ontario and Sonia E. Bayne from Connecticut, technical writers Kevin Harper (another Texan) and Laura J. Modisette from Ohio, information designer Susan M.J. Lester from Delaware, and Pamela Thiltgen-Hester who is involved in education and performance services in St. Paul. When I came home, I told our technical writing and marketing group about the various titles that people put on their cards these days and they laughed!

...continued next column

SIG Stats

We learned some interesting information about SIGs at the conference. For example, as of May 1997, there are 17 SIGs, with 6908 members. Seven SIGs have web sites, and eight maintain listservs. Four SIGs won newsletter competition awards this past year.

The most interesting statistic was the results of an *Intercom* survey on what the STC membership wanted from the *Intercom* magazine. There were requests such as writing tips, articles on layout and graphic design, WWW information and resources, coverage of visual communication, reviews and views of software tools, and articles on documentation planning, multimedia, and online help.

But the number one request was for more information about SIG activities! All the SIG managers took this news as proof and motivation that STC members are extremely interested in hearing about what the SIGs do. ♦

About Tufte

Bill Sullivan: I am new to Information Design, so I am going to have to say the focus it gave me on Tufte who, as everyone knows, is adored. I don't even know if he qualifies as an information designer. In fact, who does qualify as an information designer? I can't tell if information design is something all writers must and should do, or if it requires some form of monkish initiation rites with chanting and incense at some lofty university before you can assume to do it.

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Peggy Malecki: I really didn't get much out of Tufte's presentation that wasn't in his books. Unfortunately, it seemed more like a commercial for his new book. I am glad, though, that he stressed the importance of creatively "copying" other people's work, rather than reinventing the wheel every time.

Editor adds: I treasure the book I have as a reference and stimulant. It contains more graphics than text, and all the tables, graphs, and other graphics demonstrate Tufte's major premise that graphics can convey information without text; they are not limited to enhancing or illustrating text.

Two of his ideas that I grapple with are (1) Good graphics present several nuggets of information rather than presenting one specific point. (2) Simplicity of design is essential. Some people question whether the meaning to be conveyed might be lost in simplification. For me, Tufte's graphics are complicated; requiring study but always providing lots of information. Although the book is controversial, it helps me mentally clarify the **real** message I want to convey. I have never been able to put as much information into a graph or table as Tufte does, but I have been able to understand others' graphics and improve my own by trying to use his methods of thinking. Tufte doesn't solve problems or give answers, he forces you to think graphically and creatively. Unfortunately, few of us have the time to dwell on his ideas long enough to apply them.

As of the end of July, the Information Design SIG has **282 members!**

About John Bowie

Bill Sullivan: The challenges put forth by John S. Bowie in a talk, "Revolutionizing Your Vision, Masterminding Your Future," was terrific. Bowie basically stuck a finger down everybody's throat and told us to think not just about designing products but about designing users.

Donna Doucette: If you think it's too hard to program the computer for a task, just think how much harder it is to program the human. That was John Bowie's theme during his 90-minute demonstration of how to use information management for document design. His was one of the sessions I found especially useful at the conference.

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Bowie focused on the need to develop products that help the user accomplish his primary job (Job 1) without forcing him or her to perform a second job (Job 2): learning to use the product. (Bowie focused primarily on computer-related products.)

If the user must read a 700-page manual in order to use the product, he is being forced to do two jobs. Far better to build information into the product itself. Bowie suggested that the technical writer should focus on following information design principles and becoming a co-designer of the product. Developers are accustomed to thinking that successful design results in a product that ultimately gets Job 1 done. But the product is only part of a successful design, Bowie said. "You also must design for the human interface. It is the interaction between the human and the computer that gets the job done." Unfortunately, many product developers try to make the human do work that is inappropriate, such as gathering the data the machine needs to run. The user's guide or technical manual then becomes an attempt to program the human to use the product. But with a properly engineered product, Bowie continued, the only thing a user should need is the installation guide, a Getting Started booklet, and a set of tips or alternatives for working smarter.

The first obstacle an information manager will encounter is a programmer who thinks it is too hard to redo code or too hard to get the machine to perform a certain task. If it is too hard to program the machine, Bowie countered, then it is probably

impossible to program the human to complete that task. To illustrate, he displayed a diagram of the attributes a programmer must consider when trying to program a human brain. There are multiple compilers the programmer must consider: the French compiler, the English compiler, the Spanish compiler, the dialects. Then you must prepare for buffer overflows, deal with imprecise programming languages, allow for experience filters and variable performance, and, of course, figure out how to deal with emotion chips- "a computer with an ATTITUDE!" Instead of trying the impossible - programming the human - Bowie recommends eliminating every task that is not relevant to the user accomplishing Job 1. These other items should be handled by the product, not by the human, if at all possible.

At Hewlett-Packard, they use three "lenses" to examine the material -relevance, accessibility, and effectiveness. First, they examine the information or procedure for its relevance to Job1. If it is not relevant, it should not be part of the user's tasks; instead, he says, integrate that information into the product itself. The second "lens," accessibility, ensures that the user can efficiently get the information needed by using the product with a minimum amount of time wasted on procedural errors. Bowie said that 30 percent of a user's time is spent recovering from errors.

Finally, if the tasks are both relevant and accessible, look at the tasks' effectiveness. That is, can the user complete Job 1 (user's goal) with the informa-

Bowie urged that writers get out and talk to the customers, see what they want, and use that information to help "clarify the business mission."

tion received from the product? This last "lens" -effectiveness - is the source for the content of manuals and online help. Bowie's primary example was a TV remote controller he had purchased. Its instructions were ludicrous; the burden on the user was exorbitant; the information needed was not easily accessible; and once you had the operating information, you could not apply it easily.

To know the audience, Bowie urged that writers get out and talk to the customers, see what they want, and use that information to help "clarify the business mission." He says to try prototypes and object-oriented design methods. He also recommends

developing a skill set that includes Job1 analysis, modeling, ROI, leadership, and persuasion. A lot of what I hear at STC and other conferences is sort of pie in the sky. It describes an ideal situation toward which we can all work, even if many of us are not in a situation to implement the entire scenario. I think some of what Bowie said falls in this category.

About Ginny Redish

Bill Sullivan: I attended a session by Ginny Redish (co-author with Joseph S. Dumas of *A Practical Guide to Usability Testing*) and she quoted Karen Shriver's book extensively.

Donna Doucette: Ginny Redish placed similar [to Bowie] emphasis on the Job 1 issue in her presentation. "Nobody reads manuals," she noted. "They use documents." That approach - reading to do, rather than reading to learn - is what distinguishes user behavior with manuals and documentation. Although people claim to be reading and scanning manuals, in fact they usually turn to manuals only when they are in trouble. They look for the answer to a specific problem, seldom reading more than two sentences at a time, and rarely reading a section in its entirety.

To design documents for such an audience, Redish said one key is to focus on the user's tasks when organizing sections and writing headings. Beware of the pseudo-task, Redish warned. Many of the task-oriented headings in manuals and help documents actually focus on the system's function rather than the user's goal. As examples she cited the headings "Adjusting the Registration" and "Using the Clock Function." If these headings actually focused on the user's tasks, they might read "Calibrating the colors" and "Setting the timer."

Organizing documents at the right level is a sec-

ond key to developing documents that help users find what they need. Documents that focus only on the higher levels may not tell the user exactly which steps to accomplish a desired goal. Conversely, documents that focus only on the lower levels may not help the user perform extra tasks - for example, a user looking for ways to send email to multiple addresses may not realize that distribution lists are available. Documents should also help both novices and the users with more complex tasks, Redish said.

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Geoff Hart: Clarifying Redish, a related phrase is "reading to learn to do", not "reading to learn" or "reading to do". Redish's point that the words used in manuals often describe the tasks in the program or system instead of the tasks that the manual user needs to accomplish his or her desired goal is clearest by example: A typical heading might be "The Default Parameters Menu command", which describes what appears in the software; a user would be better served to see "Setting the default parameters for your software".

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See you in October?

What: ACM's SIG on Documentation and IEEE's Professional Communication Society joint conference *Crossroads in Communication*, <http://www.acm.org/sigdoc/>

When: October 19-24, 1997

Where: Salt Lake City, Utah at Snowbird Resort.

Who: Among others, your fellow SIG members: Karen Schriver (keynote speaker), Kim Sydow Campbell and George Hayhoe (part of a panel on tech comm journals), Jonathan Price and Michael Albers (presenting papers), and Beth Mazur (leading a pre-conference workshop).

Dinner! The ID SIG dinner is tentatively scheduled for Wednesday evening, the 22nd. For more details, please send mail to mazur@maya.com.

About Whitney Quesenbery

Donna Doucette: I found Quesenbery's discussion of "Beyond Help: Interface Design Paradigms for On-line Documents" to be useful. [All of Quesenbery's presentations at the conference are available at <http://www.cognetics.com/presentations.stc1997.html>]

Editor adds: In one of her other presentations, "Building Documentation into the Interface: A Cognitive Theory," Quesenbery reflects the same thinking described in the reports on Bowie's and Redish's remarks. The presentation Doucette attended coordinates tools with user thinking. A visit to that web site would be the best way to benefit from these ideas.

In summary ...

Overall, Information Design colleagues apparently received strong usable messages from sessions that focused on the importance of the product user's or audience's goal. Documentation of all types should free the product user from extra tasks to make the product work before using it to complete a task. While Bowie urged Information Designers to get involved during product development in addition to writing good documentation, both Redish and Quesenbery suggested that the words and diagrams in documentation can help the product user when his or her thinking processes are consciously considered. Since several presenters emphasized this point, existing documents have evidently failed to adequately accommodate the user/audience.

Marilyn O'Leary is a technical writer with Louisiana Sea Grant College Program. She can be reached at moleary@lsuvm.sncc.lsu.edu.

The ID FAQ

by Elizabeth Dillon

Recent activity on the Information Design SIG list prompted several members to suggest building a list of frequently asked questions list (FAQ). Marilyn O'Leary prepared the first question, how to present information to the user-in-a-hurry, and posted it to the list.

Mike Sharp and I agreed to keep an eye on the list and pull together related contributions as other questions occur. We will post these as a reference on the ID SIG web page.

As the FAQ is to be based on list activity you, as members, are encouraged to keep the good ideas rolling. Remember that the FAQ is not meant to be the last word on information design, but a cache of hints for practioners-in-a-hurry. Dissenting and revolutionary viewpoints are also welcome.

Ideas for the FAQ can be e-mailed to Mike Sharp at msharp@snip.net or Elizabeth Dillon at elizabeth.dillon@asg.unb.ca or sent to:

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We look forward to hearing from you! ♦

Coming next issue ...



The guest editor for the Fall '97 issue of *Design Matters* is Mike Sharp. His topic will be the interaction between text and graphics. If you are interested in submitting an article or contributing in some other way, please send Mike email at msharp@snip.net.

Deadline for submissions is September 30th, but please let Mike know prior to that if you are planning to contribute.

To find out more about becoming a guest editor, send email to Beth Mazur at mazur@maya.com.

ID SIG Goals

by Cheri Taylor, ID SIG Manager

One of the responsibilities of each STC Special Interest Group is to plan and execute a program of activities that promotes the professional development of its members. Over two dozen of us attended the ID SIG business meeting at the Toronto conference, and we spent the majority of the meeting listing several possible goals for our coming years.

First, let me mention STC's overall goals for SIGs. There are three: (1) Go online, (2) Grow the services, and (3) Increase visibility. We added our own general theme to those: we want to "push the SIG envelope" in terms of activities, creativity, and benefits both inside and outside STC.

STC recommends selecting three or four key goals for a year, keeping the effort focused on deliverables that are achievable, on time and within budget. What I've done is taken our list of ideas from members, added in the goals that STC recommends for SIGs, put them into a suggested schedule, and listed them as follows.

Goals for Each Year

- Publish our SIG newsletter *Design Matters* four times each year (Beth Mazur).
- Arrange to publish one article per quarter related to ID or the ID SIG in *Intercom* (open).
- Coordinate SIG-related activities at each annual conference, including the business meeting, SIG luncheon, and at least one session (Pamela Wagner).

Goals for 1997-98

- By August, post a first version of our ID SIG listserv FAQ (Elizabeth Dillon).
- By October, complete the seating of our Advisory Panel (Karen Schriver).
- By December, complete the enhancement to the ID SIG web site (open).
- By May, hold a progression at the annual conference (open).
- By May, hold the web site / online help evaluations at the annual conference (open).
- By May, hold a poster display at the annual conference (open).

Even though May seems a long time away, the proposals for these conference activities are due August 1, 1997! If we are to accomplish these three conference goals, we need goal owners for these right away. If you've always wanted to hold a session,

now's your chance — each of these conference goals is ideal for a single owner or for two or more people to get together to do.

Three-Year Goals

These are goals we would like to accomplish within three years, with tentative years assigned:

- In 1998-99, do a special issue or section of *Technical Communication* on ID.
- In 1998-99, do a design review of the STC web site.
- In 1999-00, set up an ID resource for regional conferences.
- In 1999-00, add a Chapter SIG Coordinator position.
- By 1999-00, add a Community Service Coordinator position.
- In 2000-01, hold an ID mini-conference associated with the annual conference.

Future Goals

These goals go beyond the three-year timeframe, with tentative years assigned:

- In 2001-02, hold an online conference.
- In 2001-02, compile an STC Press anthology or book on ID practice.
- In 2002-03, propose a research grant project.

In addition to these ideas for goals, several people suggested good ideas for topics for articles, sessions, and workshops. These ideas include:

- Do ID analysis of public speeches.
- Explore the interface between the ID academic and the ID practitioner (types of problems, networking, leads, different backgrounds sharing knowledge).
- Educate the public about ID (we're not all graphic designers).

One thing I would like to point out is that all of our one-year goals (this year's goals) are international in scope. We don't start to branch out to the local level or outside STC until after this year (such as with the Chapter SIG and Community Service coordinator positions). I think this approach is fine for our first full year as a SIG, but I would like to see us get involved on the local and external levels as quickly as possible.

Any suggestions? Please email them to me at taylorcw@compuserve.com or call 919-859-1467. ♦

Information Design

The field of information design applies traditional and evolving design principles to the process of translating complex, unorganized, or unstructured data into valuable, meaningful information.

The practice of information design requires an interdisciplinary approach which combines skills in graphic design, writing and editing, instructional design, human performance technology, and human factors.

Although its reach extends far beyond traditional boundaries of technical communication, the essentials of information design profoundly affect our work. The products of information design occur in any domain in which clear communication is essential, from those familiar to technical communicators, such as reference manuals and online help systems, to those outside the traditional realm of our work, such as public signage in public buildings, insurance and tax forms, and user interface design.

Our Mission

The mission of our SIG is to meet the professional development needs of our members and to act as a vital conduit between STC and information designers at large. Our objectives include:

- advancing awareness of information design among STC members;
- assisting members interested in acquiring information design skills;
- encouraging information design research and making available information design resources;
- examining the roles and practices of the information designer;
- and providing a forum for the discussion of relevant topics.

Please visit the ID SIG website at <http://stc.org/pics/idsig/>



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