My name is Liz Nickerson.

I’m a technical writer.

These are some examples of my work.

I write step-by-step instructions that help users do their jobs.

As an intern at Oracle, I created user assistance for a clinical study design tool.

Create a form

Learn more about forms and validation rules in the FAQs.

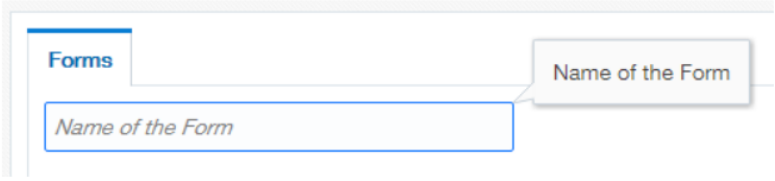
The topics were task-based, and captured the user's workflow.

Task 1. Create the form

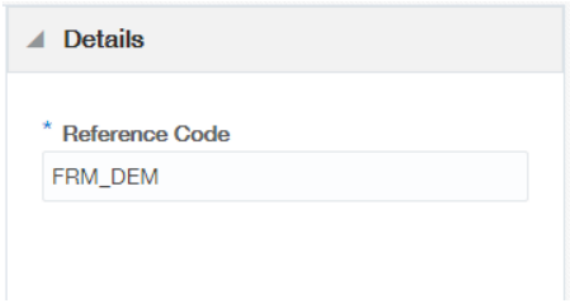
Show me how!

1. On the Home page, click the pencil button ( ) on the study you want to edit.
2. Below Draft, click the study version.
3. Along the top, make sure that **Data Capture** is selected.
4. If you have no forms, click **Create Form**.
   If you have one or more forms, click **Add Form** in the upper left.
5. In the upper left, enter a name for the form.

My goal was to help users do their jobs, rather than document functionality.



6. On the right, below Details, enter a reference code for the form. A reference code is a one-word abbreviation for the form. This field is reserved for a future release, and any value you enter isn't used anywhere else.



Tip: As you create a form, consider documenting the test cases for its questions.

Task 2. Determine the kind of data that you need to collect and create questions

1. Create questions for the data you need to capture:
   - Create a text question to capture a value with either letters only or letters and numbers.
   - Create a number question to capture a value with numbers only.
   - Create a date/time question to capture a date value, with or without a time.
   - Create a drop-down question to capture one or more answers that site users select from a drop-down.
2. If you need to capture a value that determines the stratum groups subjects are randomized to, create one or more number questions or drop-down questions.
   - Number questions must be required and must have a **Range** validation rule for which **Include Value in Range** is selected.
   - Drop-down questions must be required and must have a **Select Exactly** validation rule that allows exactly **1** selection.

   You create the stratum groups when you create a randomization design.

Task 3. Save the form

- In the lower right of the form, click **Save**.

  Tip: If the **Save** button is disabled, make sure there are no blank questions on the form.

Some topics included conceptual information ("Tips") that helped users apply their domain knowledge to the system.

Tips

- Questions verifying that subjects meet eligibility criteria, such as availability of a signed informed consent document, should be included on forms.
- When subjects need to meet age criteria to enroll in a study and the study allows the collection of date of birth, create two required questions on a form:
  - In one question, ask the subject's date of birth.
  - In another question, ask the subject's age.

    Create a validation rule on the age question so that subjects who do not qualify cannot enroll.
- If you're collecting data where multiple values are related, create separate questions for each value. For example, to collect data about blood pressure, create two number questions, one for systolic blood pressure and the other for diastolic blood pressure.

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Create label groups in Testing mode

Need to perform this task for a production study?

Do I have to do this? Create label groups only if a country in your study has special label requirements. A label group is a collection of kits that have the same label. Label groups ensure that kits are shipped to countries with appropriate labels. Create label groups in Testing mode if the study requires them and you want to verify the complete end-to-end business process.

For some topics, I developed associated video content.

To create a label group:

Show me how!

1. On the Home page, click the pencil button ( ) on a study, and make sure a study version is in Testing.
2. Click the Testing Mode button ( ) on the study.
3. Along the top, click **Supplies**.
4. Below the study name, click the **Inventory** tab.
5. In the lower right, expand **Label Groups**.
6. Click **Create Label Group**, and fill in the fields.
   - **Label Group Title**
7. Select the countries to include in the label group by clicking the arrow buttons, and then click **Create**.

To assign kits to a label group:

1. On the Home page, click the pencil button ( ) on a study, and make sure a study version is in Approved.
2. Click the Testing Mode button ( ) on the study.
3. Along the top, click **Supplies**.
4. Below the study name, click the **Inventory** tab.
5. Click a kit type.
6. Above the kit list, use the filters to return the kits you want to assign to the label group:
   a. Below Location, click **Depots**, and select the depot that is supplying kits for the country from the **All Depots** drop-down.
   b. Above the kit list, from the **Status** drop-down, select **Available**.
   c. If necessary, narrow your view further by clicking **Kit** or **Sequence**, and enter a range of kit or sequence numbers.
7. In the list, select the kits to include in the label group.
8. On the right, make sure **Kit Settings** is expanded and, from the **Label Group** drop-down, select the label group.
9. Click **Update Kits**.
10. In the confirmation window, select a reason for change and click **Yes**.
11. Repeat this procedure for every kit type included in the label group.

Tip: To return to the list of kit types, above the kit list and to the left of the kit type, click **Back**.

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I make abstract concepts easy to understand.

At Dimensional Insight, I authored a user guide for a data analytics platform.

The UI shows users two types of analysis. One type is called a “default analysis,” because the system creates it by default. The other type is called a “custom analysis,” because it’s created by a developer during system configuration.

Users struggled to understand the difference between the two options, because the UI uses the language of the system. In the documentation, I mapped the abstract language of the system to concrete terminology that users understand.

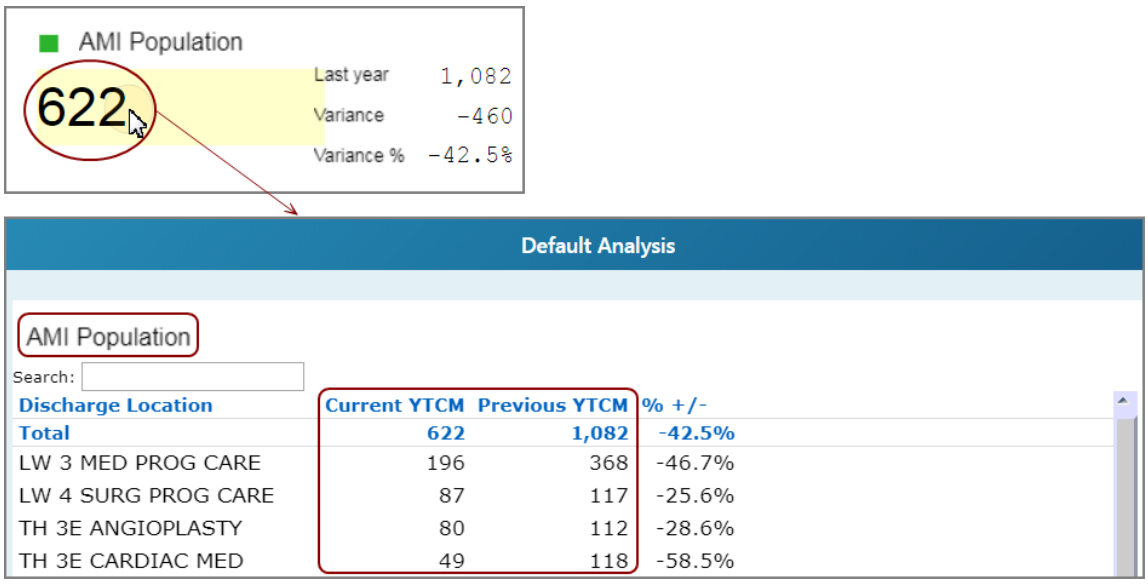
Measure Analysis Options

About Default and Custom Analyses

When working with Measure Factory data, there are two distinct types of analysis:

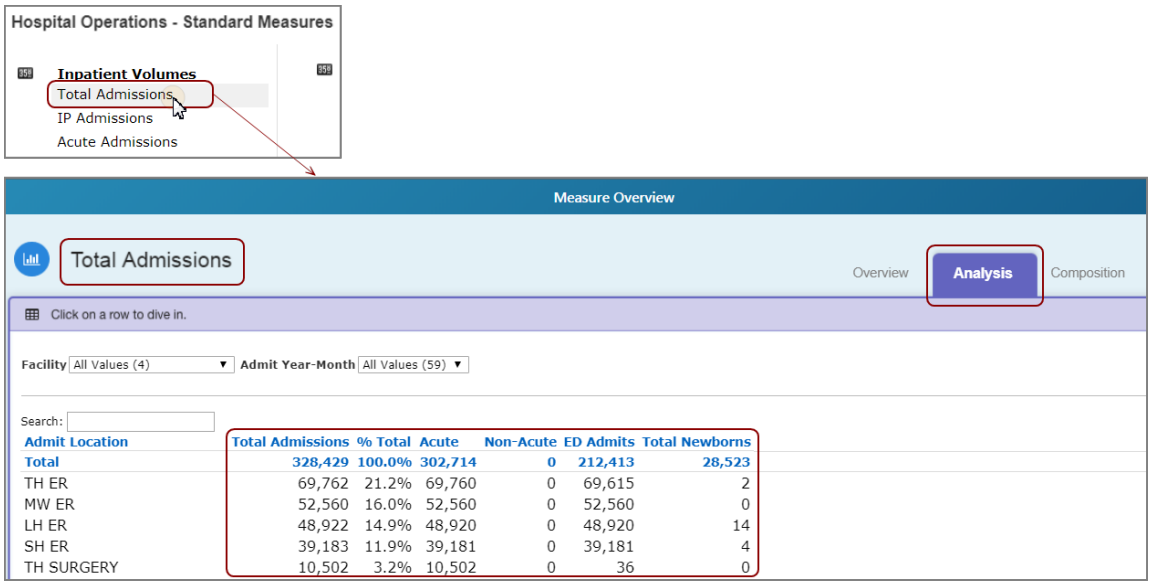
- **Default analysis**—This type of analysis allows you to compare one measure's data between time-periods. When doing a default analysis, you can work with data from only one measure at a time. You perform a default analysis when you want to understand how one measure's data has changed.

  Typically, you start a default analysis by clicking a value—either a number or a graphical value—on a dashboard.



- **Custom analysis**—This type of analysis allows you to compare data from several measures, but does not show a time-period comparison. You perform a custom analysis when you want to understand how your organization's most current data differs between measures, but do not need to know how the data has changed.

To start a custom analysis, go to the **Measure Overview** page, and click the **Analysis** tab.



I think critically about my writing, and incorporate user feedback.

At Dimensional Insight, I created a user guide for a product called Hospital Operations.

The users are clinical data analysts and healthcare operations professionals. Their goal is to make data-driven decisions, based on a set of industry-standard performance criteria.

Before

Measure Factory Student Guide

Hospital Operations 1.0.6

Contents

In the first version of this guide, the topics were long, and users had a hard time finding the information they needed.

Because the topic titles were similar, users found the TOC difficult to scan.

Viewing the Executive Dashboard

1. On the home page, click **Executive Dashboard**.
2. In the upper right, note the date and time that the data was last updated in the **Last Refreshed** field.
3. In the **Facility** QuickView, choose whether to view data for all facilities or one facility.

   NOTE: You use QuickViews to adjust your view of data. In Hospital Operations, QuickViews typically display as pull-down menus.
4. In the **Calendar** QuickView, choose one of the following:
   - **Standard**, if you want to view data beginning with January of the current year
   - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

   On the right, the **Year-to-Date Summary** updates based on your selection.
5. Review the data:
   a. Each section of the page includes a list of measures on the left. Click a measure to view its data on the right.

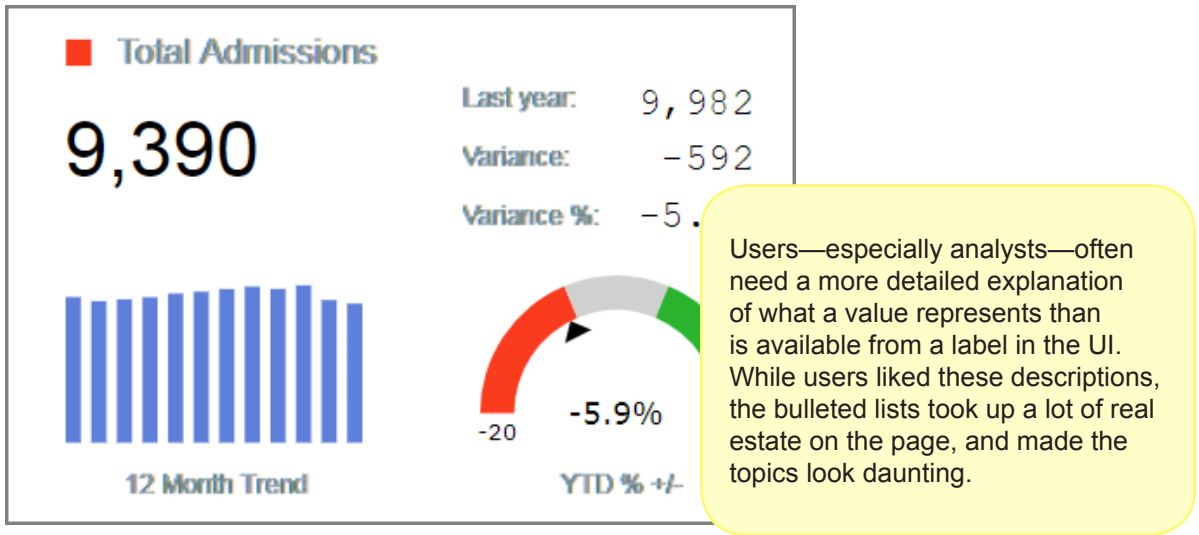
      TIP: The color to the left of the measure tells you whether performance has improved, declined, or remained neutral.

Each topic helps users do a few things:

- Navigate to a dashboard, and filter their view of the data
- Interpret what the values show, and understand the time-period that they're from
- Analyze the values to begin data exploration

Often, users wanted to perform only one or two of these tasks. It was challenging for users to find the tasks they wanted, because they were all part of the same procedure.

b. On the right, review the data:



- Below the measure name, the total for the current year-to-date displays.

  NOTE: Year-to-date values are calculated to the last day of the most recent complete month, rather than to today.
- The **Last year** value shows the total for the previous year-to-date.
- The **Variance** value shows the number difference between the current and previous year-to-date.
- The **Variance %** value shows the percent difference between the current and previous year-to-date.
- In the lower left, a bar chart shows data for the past 12 months. The most recent complete month displays on the right side of the chart.
- In the lower right, a graphical representation of the percent difference displays. The colors tell you whether performance has improved, declined, or remained neutral.

TIP: In this example, a five percent increase or decrease constitutes a significant change in performance, but keep in mind that your organization can specify a percentage other than what is shown here.

6. Analyze the data:

To analyze...	Steps
Data for the current year-to-date compared to the previous year-to-date **NOTE**: Year-to-date values are calculated to the last day of the most recent complete month, rather than to today.	1. In any of the page areas, click the measure with the data you want to analyze. 2. On the right, click the total for the current year-to-date. The **Default Analysis** page opens. 3. Dive on the data. For more information, see *Diving on Data* on page 68. **TIP**: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Originally, this content was delivered as online help, as well as PDF. The tables were usable in the online help, but proved difficult to scan in print.

To analyze...	Steps
Data for a month in the current year compared to the same month last year	1. In any of the page areas, click the measure with the data you want to analyze. 2. On the bar chart, click the month that you want to view data for. **TIP**: Point to an area of the chart to see labels and number values. The **Default Analysis** page opens. In the upper left, the name of the selected month appears below the **Search** box. 3. Dive on the data. For more information, see *Diving on Data* on page 68. **TIP**: In the lower left of the window, you can click an option to open the data in Excel or PDF format.
All data for a measure, without a time period comparison	1. In any of the page areas, click the measure with the data you want to analyze. 2. In the upper right of the page area, click the **Analysis** icon  . The **Measure Analysis** page opens. 3. In the upper left, you can use the QuickViews to adjust your view of the data. 4. Dive on the data. For more information, see *Diving on Data* on page 68. **TIP**: In the lower left of the window, you can click an option to open the data in Excel or PDF format, or in ProDiver.

After

Measure Factory Student Guide

Hospital Operations 2.0.1

In the second version, I added subtopics to make it easier for users to land on the content they want.

Contents

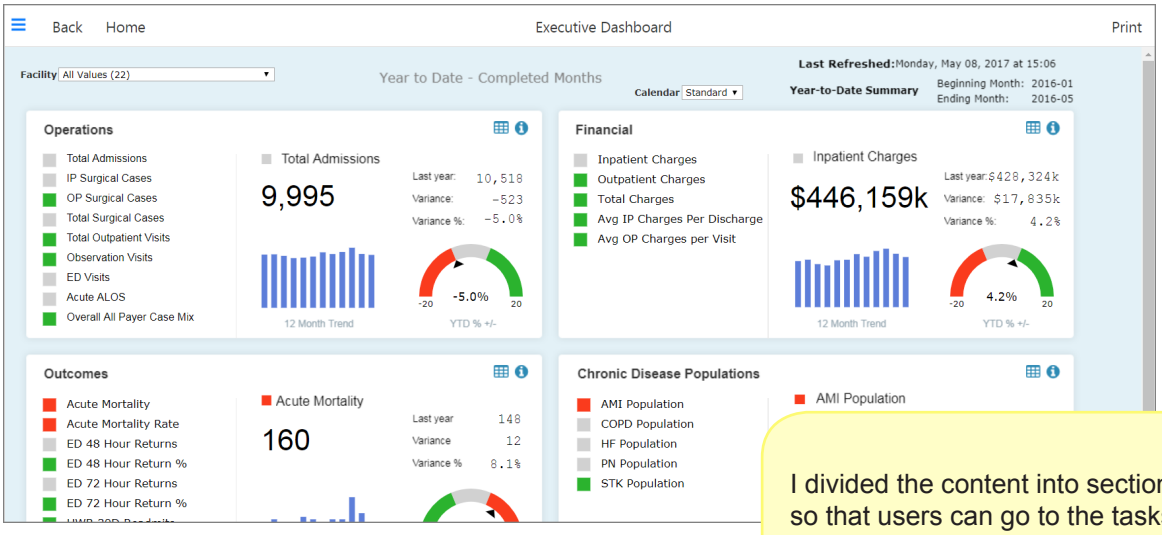
I reduced the length of the topic titles, so that users can scan the TOC more quickly.

What about action-oriented titles?

While I typically use action-oriented titles, I thought this model would improve the usability of the guide. Here's why:

- This guide is delivered as a companion to an in-person training session.
- The guide follows the same structure as the training session, so that users can follow along with the presenter.
- The name of each dashboard makes its function obvious to users.

Executive Dashboard



I divided the content into sections, so that users can go to the tasks they want, without having to read the entire procedure.

Go to the dashboard and adjust your view

1. On the home page, click **Executive Dashboard**.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
4. In the **Calendar** pull-down menu, choose one of the following:
   - **Standard**, if you want to view data beginning with January of the current year
   - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

   On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

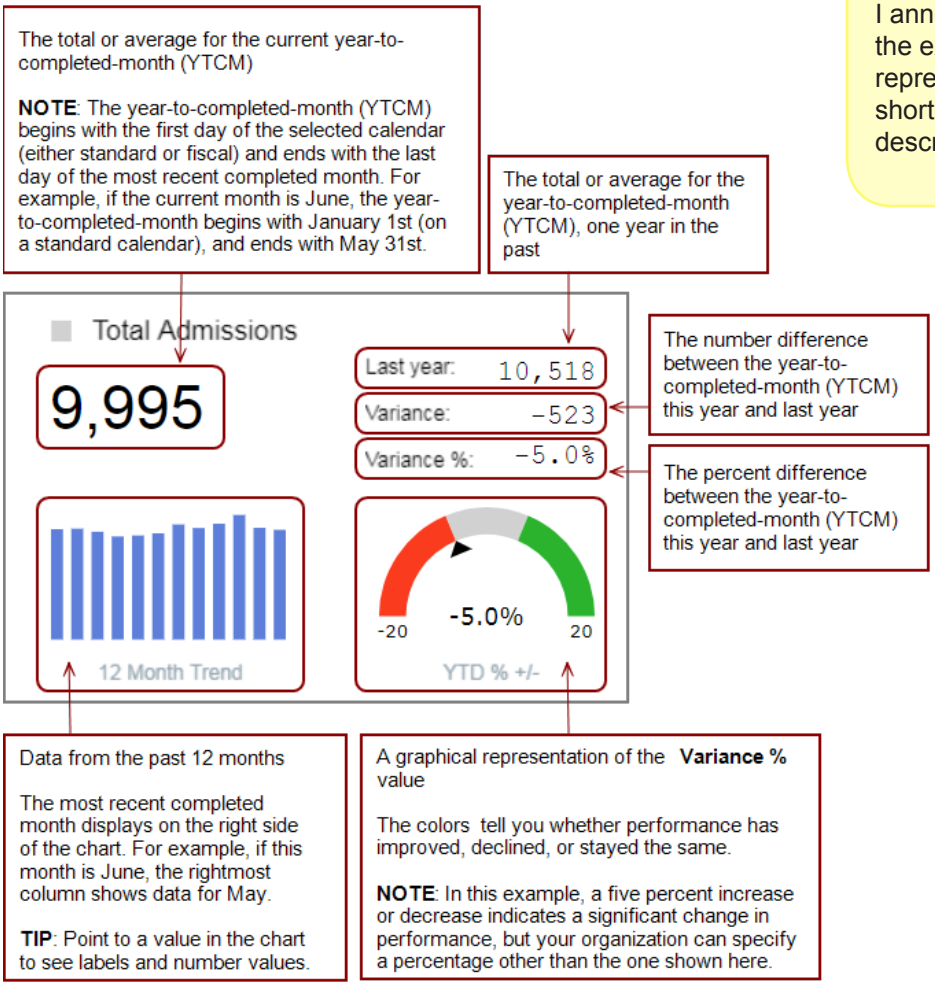
1. Each section of the page includes a list of measures on the left. Click a measure to view its data on the right.

   The label above the data tells you which measure is selected.

   TIP: The color to the left of the measure indicates whether performance has improved, declined, or stayed the same.

2. On the right, note the values:

I annotated the screen shots with the explanation of what each value represents. This made the content shorter, because I didn't have to describe the location of the values.



Analyze the data

Choose the data that you want to analyze:

Data from a selected month, compared to the same month last year

1. Click the measure with the data you want to analyze.

   The measure's data displays on the right.

2. On the bar chart, click the month with the data you want to analyze.

   TIP: Point to a value in the chart to see labels and number values.

   The **Default Analysis** page opens.

3. Note the date range:

   - The **Current** column shows data from the selected month.
   - The **Previous** column shows data from the same month, one year in the past.

4. Dive on the data. For more information, see Diving on Data on page 70.

   TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

For the second version, I split these tasks up with headings, rather than using tables.

Data from the current year-to-completed-month (YTCM), compared to the same time-period last year

1. Click the measure with the data you want to analyze.

   The measure's data displays on the right.

2. Below the measure name, click the value for the current year-to-completed-month (YTCM).

   The **Default Analysis** page opens.

3. Dive on the data. For more information, see Diving on Data on page 70.

   TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison

1. Click the measure with the data you want to analyze.

   The measure's data displays on the right.

2. To the upper right of the measure name, click the **Analysis** icon .

   The **Measure Overview** page opens.

3. Do one of the following:

   - Analyze how the data has changed over time (default analysis)
   - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

   For more information, see Analyzing Measure Data on page 80.

I conduct usability testing, and share my findings.

I consider usability testing to be a critical part of my writing process.

Hello,

I'm looking for people to participate in a usability test of a draft of the DivePort User Help. Ideally, I would like to have between 3 and 5 participants. Your participation would be such an enormous help in creating readable, user-friendly content.

What is a usability test?

Usability testing allows people to figure out how easy or difficult something is to use, by watching others try to use it. During the test, I'll ask you to use a draft of the DivePort User Help to complete some tasks. My goal is to observe where you get confused or run into problems, so that I can make the documentation clearer for customers.

This is a test of the documentation, not a test of you.

To prepare for a usability test, I seek out participants who have experience similar to real users.

Eligibility

To be eligible for this test you must:

- Have little to no experience working with DivePort.
- Have little to no experience working with Measure Factory.

Logistics

The test will take about 15 minutes. Sessions will be held in the Burlington kitchen.

If you're interested

Send me an email listing some times during next week that you're free. In the email, also specify whether it's okay to record your session (you can still participate, even if you'd prefer not to have your session recorded). I'll send you a meeting invite for a mutually workable time.

If you're interested, but not eligible

Send me an email confirming your interest, and describe your level of experience with our other products. The Documentation Group will keep you in mind for future usability tests.

Know anyone else who might be interested?

Feel free to forward them this email.

Thanks,
Liz

During the tests, I read from a script to ensure that I provide all participants with the same experience.

Hi, how are you!

Thanks for agreeing to participate in this usability test. My goal today is to observe how you use the documentation to complete some tasks, so that I can uncover issues with it and then improve it for customers. That being said, this a test of the documentation, not a test of you. Any difficulties you experience are a result of the documentation, and do not reflect on you.

If the participant agreed to have their session recorded:

You mentioned that it was okay to record this session. Are you still okay with that?

- *Yes*—Great. You'll see some recording controls in the lower left of the screen, but just try to ignore them. *Start the recording*.
- *No*—Okay, that's totally fine.

Direct the participant's attention to the screen

For this session, you're going to be working in DivePort. DivePort is a browser-based tool that allows you to view and analyze data.

Present the test handout

This handout lists the tasks that I want you try to try complete, using a draft of the documentation.

Direct the participant's attention to the screen, and click the tab for the documentation

You can access the documentation on this other tab. For each task, I want you to find the most relevant topic in the documentation, and reference the content as you're completing the task, rather than trying to intuit your way through the interface.

As you complete each task, it would help me if you could "think-aloud." That means that you verbalize any thoughts you have while completing the task. If you get stuck that's fine, but just try your best to work through the problem on your own, and then I'll step in if necessary.

Before we start, do you have any questions?

Okay, take some time to look over the handout. Take as much time as you want, and let me know when you're ready to begin.

I present test participants with a handout that lists the tasks I'm testing.

Thank you for agreeing to help me usability test the DivePort User Help. As you attempt the following tasks, keep in mind that the focus of this exercise is to uncover issues with the documentation. Any difficulties you experience are a fault of the documentation, and do not reflect on you.

If you feel unable to continue, you can withdraw from this exercise at any time. Thanks for helping me make this help system great!

Tasks

1. Figure out which version of DivePort you're using.
2. See details about what the Total Outpatient Visits measure represents.
3. Ask someone to clarify what the Normal Newborn ALOS measure means.

After the tests are finished, I report on my findings, and propose action items.

1. Users relied more heavily on the TOC than they did on the search.

Neither Amanda or Jamie searched. They used the TOC instead.

Amanda and Jamie struggled to find what they needed in the TOC when topic titles were especially long or wordy. In **Task #1**, both Jamie and Amanda had trouble finding the topic because it wasn't in the chapter that they expected, and because the title was so long that it was cut off in the navigation.

Tom was the only user that searched. Tom started out using the search, but fell back on the TOC when the search didn't help him find what he was looking for:

- During **Task #1** (at 01:41 in the recording), Tom used the search, found the topic he needed, and completed the task.
- During **Task #2** (at 02:48), Tom used the search, but didn't find what he was looking for. Next, he used the TOC.
- During **Task #3** (at 05:03), Tom used the TOC only.

What we can do: We can be conscientious about how we organize our TOCs. We also need to be sure that our topics titles are easy to scan, and that they aren't cut off in the navigation.

2. Users expected information about product versions to be on the Welcome page.

Amanda's test was the best example of this, though Jamie experienced the same issue.

During **Task #1** (at 01:31) Amanda kept returning to the Welcome page to find the version number. She assumed that she had version 7.0 of DivePort because she was using the 7.0 documentation. She also didn't realize that she had to find the point release number in addition to the version number (I had to tell her).

What we can do: We could provide the following information in a visible place on the Welcome page:

- That the user might have a version of the product other than the one we discuss in the documentation
- A cross reference to a topic that explains how to find how to find the version numbers
- The most recent version and point release of the product and of DiveLine at the time the documentation is released

3. Users didn't open togglers.

Neither Tom, Jamie, or Amanda opened the togglers. This also suggests that they didn't read the **Using this Help system** section of the Welcome page, where we explain that clicking a toggler often reveals an image.

What we can do: We should reassess our standards for how we use togglers. We also might consider the value that the **Using this Help system** section of the Welcome page adds, given that users didn't appear to read it.

4. Few users used the See Also sections.

Neither Amanda or Jamie used the See Also cross-references. Tom used the See Also cross-references once (at 06:39), when he was stuck on **Task #3**.

What we can do: Reassess our standards for the See Also section. I wonder if the cross-references need to be more visible, or in a different place?

5. Users didn't use the Index or the Glossary.

Jamie considered opening the Index during **Task #1** when he couldn't find the topic he was looking for (at 04:05), but other than that no users looked at the Index or the Glossary.

What we can do: Probably nothing for now. This is more of an FYI.