Creating instructions

Layouts and graphics

For labs next week:

- You must bring a working draft of instructions to the lab
- Have at least one instructional task ready
- Others will read and give feedback

Layout

- Information needs to be presented on the page to allow users quick and easy access

- Layout ensures that the info is readily accessible and readable

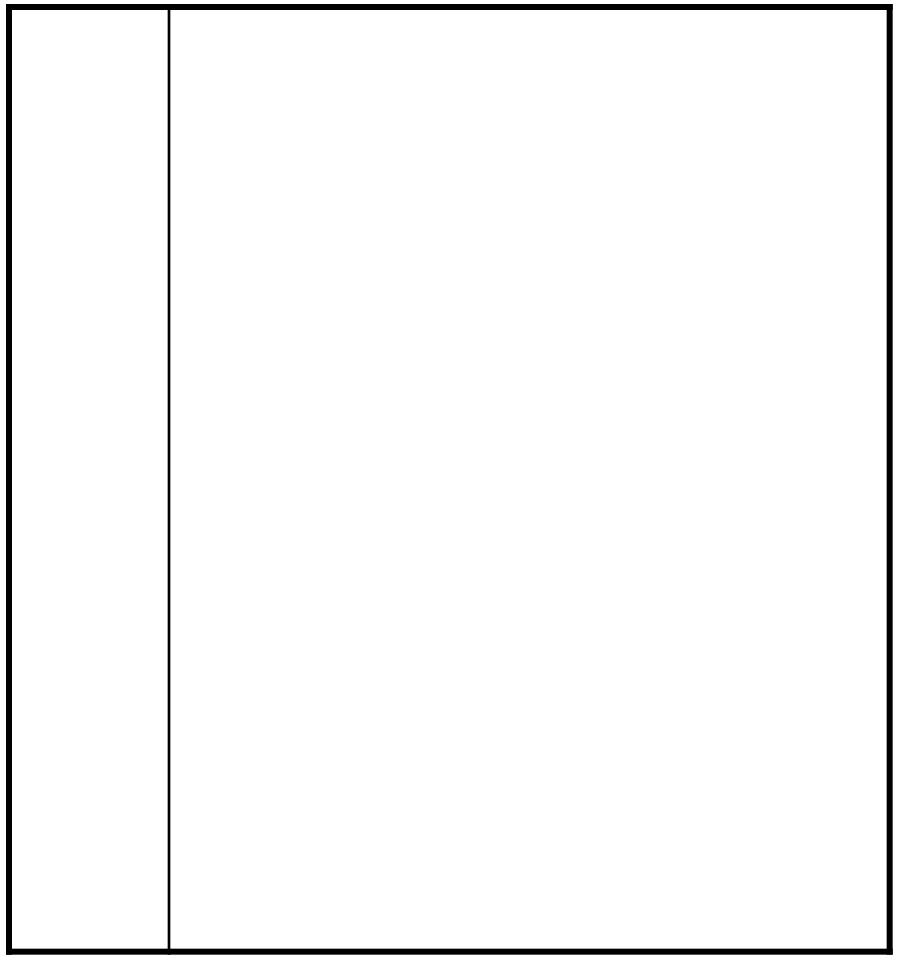
Effective Page Design

- Many software manuals follow the two-column format
- The left column is called the ‘graphics’ column
- The right column is the ‘text’ column

Example: Creating a 2-Column Layout

- Set and draw gridlines for margins & columns

- A grid allows you to decide where info will be placed



- The left graphics column contains graphics and headings that provide navigation information
- The right text column contains subheadings, explanatory notes, warnings, illustrations and instructions
- The two-column format distinguishes between navigation information and support information
- Navigation information allows easy user access to information
- Support information tells the user how to use the software

26. Under **Target Output**, select the **Screen** option, and then click **OK**.
27. In the **Compress Pictures** dialog box, click **OK**.

    PowerPoint compresses the pictures to 150 pixels per inch and deletes the parts of the pictures that you cropped earlier. If you were to save the file now, the compressed pictures would result in a smaller file size.

CLOSE the *02_Pictures1* presentation without saving your changes.

Creating a Photo Album

Creating a *photo album* in PowerPoint from pictures on your hard disk or other storage media is a great way to share photographs or other illustrations. You can customize the album by using layout options such as frames of different shapes, and you can add captions to each picture.

In this exercise, you will create a photo album displaying pictures of various items being offered for sale.

USE the *03_PhotoAlbum1* through *03_PhotoAlbum4* photographs. These practice files are located in the *Chapter06* subfolder under *SBS_PowerPoint2007*.

OPEN a new blank presentation.

1. On the **Insert** tab, in the **Illustrations** group, click the **Photo Album** button.

   The Photo Album dialog box opens.
2. Click the **File/Disk** button. In the **Insert New Pictures** dialog box, navigate to your *Documents\MSP\SBS_PowerPoint2007\Chapter06* folder.
3. Select the *03_PhotoAlbum1*, *03_PhotoAlbum2*, *03_PhotoAlbum3*, and *03_PhotoAlbum4* images, and then click **Insert**.

   The Photo Album dialog box now has four graphics files listed in the Pictures In Album list. You can select each picture in turn to view them. If you decide to change the order in which they will appear in the album, you can click a picture and then click the Move Up or Move Down button. You can also adjust the rotation, contrast, and brightness of each picture.

4. Under **Album Layout**, click the **Picture layout** arrow, and then in the list, click **4 pictures with title**.
5. Click the **Frame shape** arrow, and in the list, click **Rounded Rectangle**. Then click **Create**.

   PowerPoint creates a presentation called *Photo Album* that contains a title slide and a slide containing the four pictures.
6. On **Slide 1**, select the words *Photo Album*, and then type Favorite Things. Then replace the subtitle (*by* followed by your user name) with Unique Gifts.
7. Display **Slide 2**, click the title placeholder, and then type Something She Will Treasure.
8. In turn, select each picture, and on the **Format** contextual tab, click the **Size** Dialog Box Launcher, and on the **Size** tab of the **Size and Position** dialog box, clear the **Lock aspect ratio** check box, set the **Height** to 2.5" and the **Width** to 3.3", and then click **Close**.
9. Adjust the positions of the pictures as necessary.
10. On the **Insert** tab, in the **Illustrations** group, click the **Photo Album** arrow, and then click **Edit Photo Album**.
11. In the **Edit Photo Album** dialog box, under **Picture Options**, select the **Captions below ALL pictures** check box, and then click **Update**.

You can choose your own layout

- As long as information is accessible to the reader, it will work

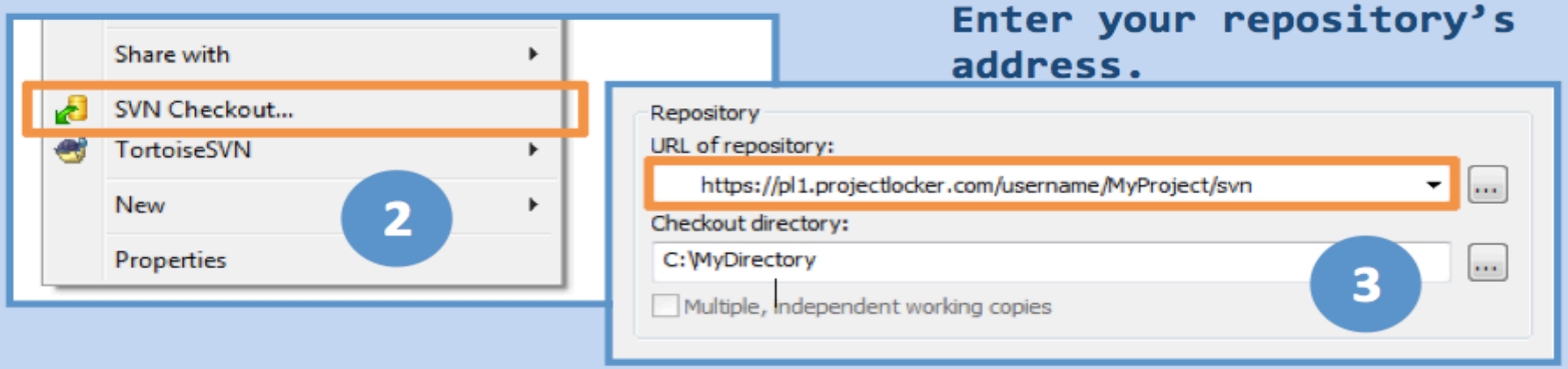
Creating a Local Working Directory

You need a local working directory that gets linked with your repository.

1. Create a new folder where you want to have your working copy of the repository. It does not matter where you create that folder, and you can also move it anytime.

2. Right-click on the folder and choose *SVN Checkout…* from the context menu.

3. In the new window, enter your repository's address (see previous page) under *URL of repository* and click *OK*. Then you will be prompted for authentication.



Using Graphics

Why focus on graphics?

- The key to many software instructions
- Image use in reports was poor at times.
  - Sizing (too large)
  - Labeling inconsistent

Incorporating Graphics

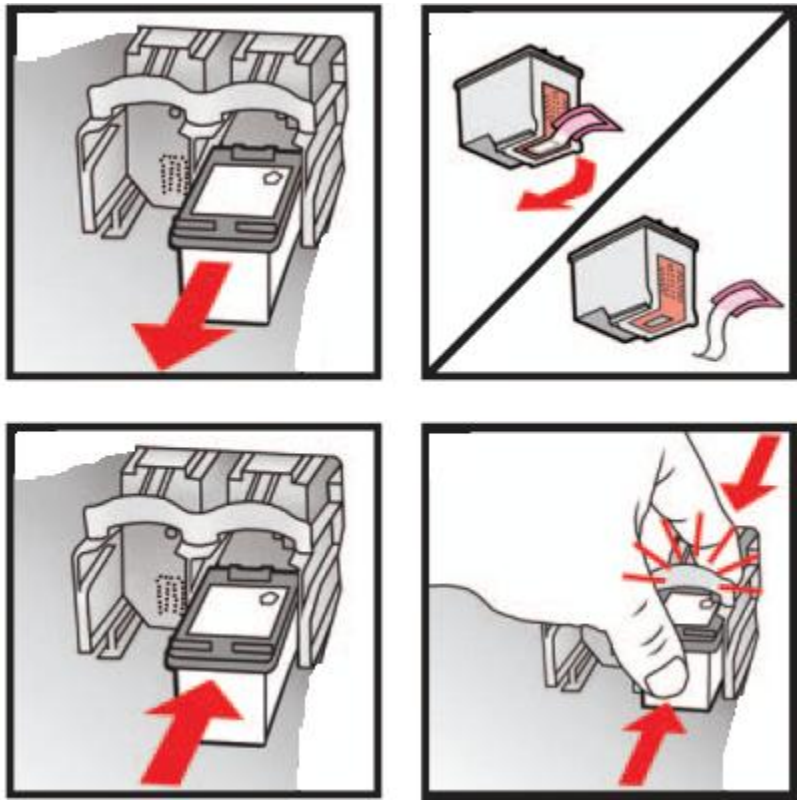
- Readers understand visual information more easily and immediately than text
- Visuals can be comprehended as a whole, in a single glance
- Graphics should be used to make instructions immediately clear and understandable to the first-time reader

Graphics Help the Users

- Include graphics to illustrate the actions you want the user to perform
- Software instructions might tell them to click on a specific button
- Hardware instructions might tell them to physically move things

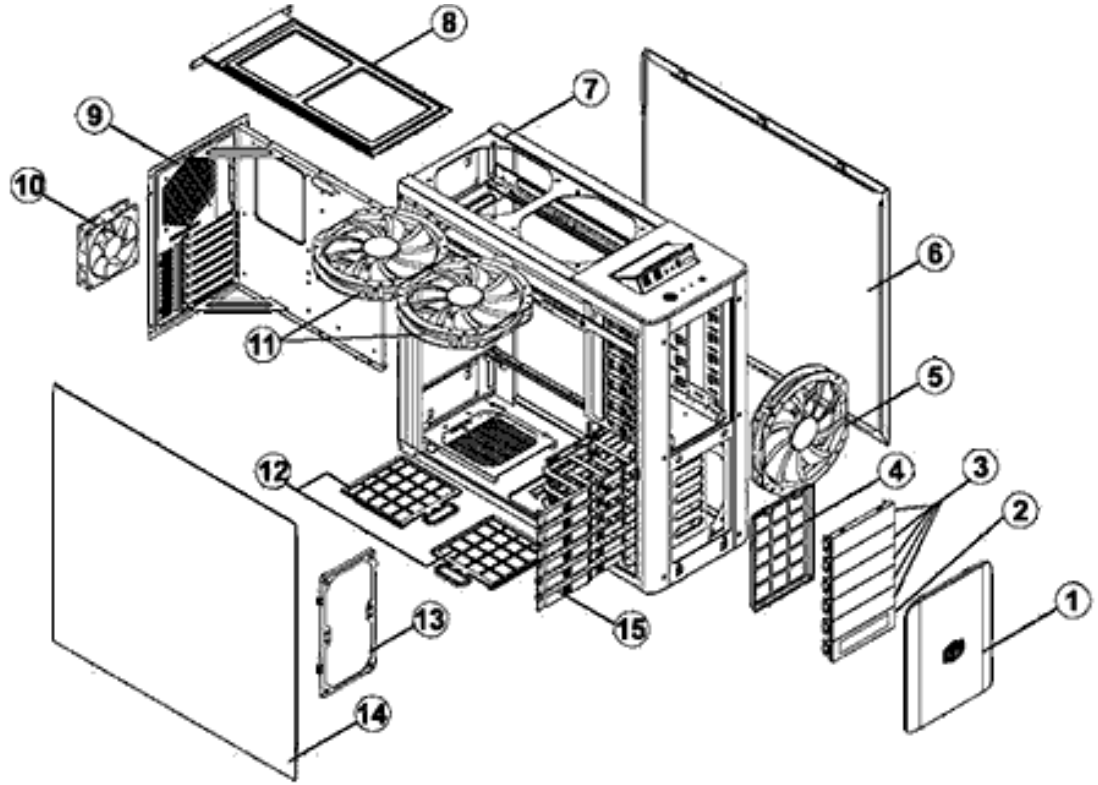
Hardware Instructions

- Are often wordless, not needing translation



Illustrations can show:

- Size, scale, perspective, placement, orientation, direction
- Spatial relationships – how parts fit together
- An overview of a process



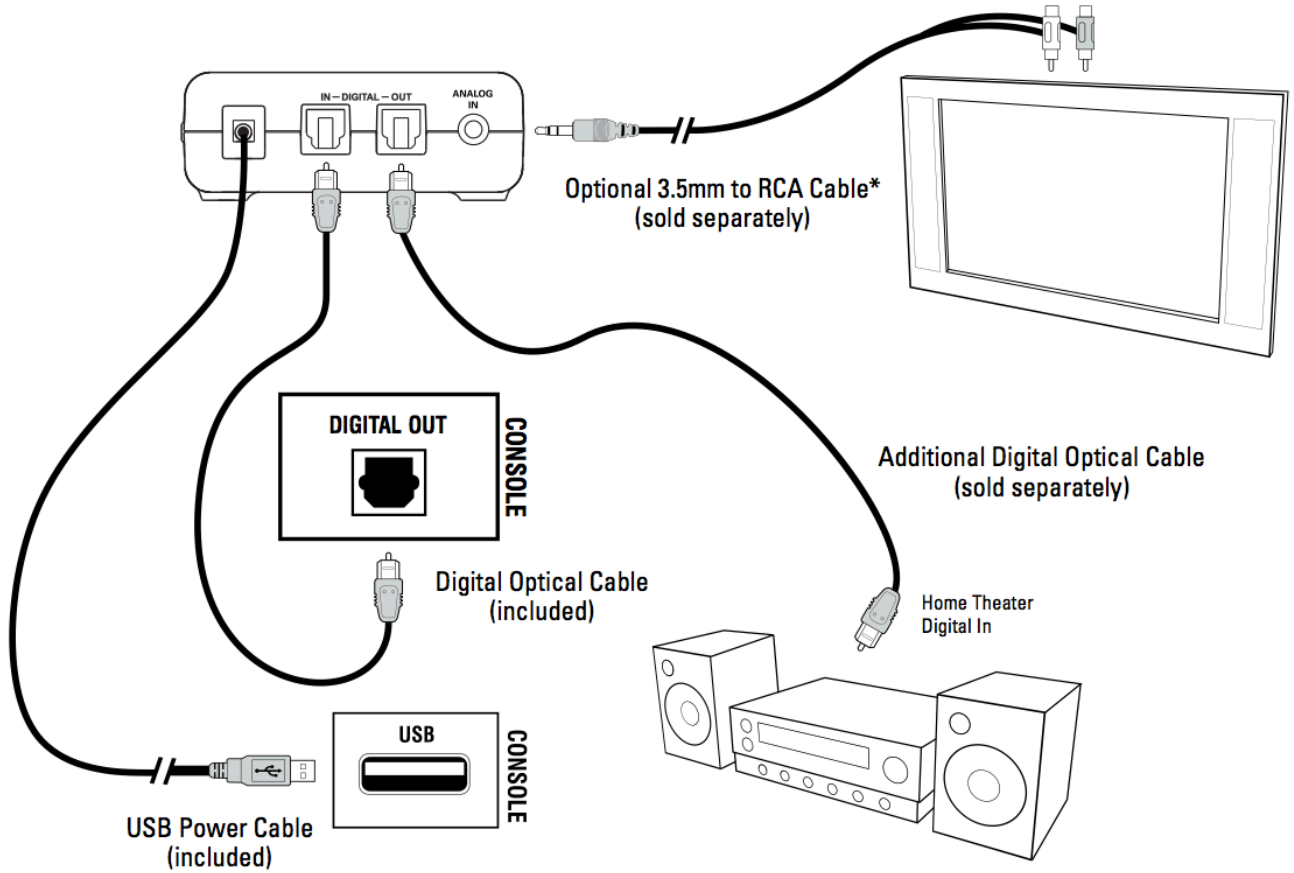
Item	Parts Name	Q'ty
1	Front panel	1
2	3.5" shield	1
3	5.25" shield	5
4	Filter(front)	1
5	Front fan 230x30 mm	1
6	Right side panel	1
7	Casing	1
8	Top cover	1

Item	Parts Name	Q'ty
9	M/B tray	1
10	Rear fan 120x25 mm	1
11	Top fan 230x30 mm	2
12	Filter(Bottom)	2
13	HDD fan bracket	1
14	Left side panel	1
15	HDD rack	6

Home Theater Setup

Setting up the transmitter as illustrated below lets you listen to your console or TV with the XP400 headset. You can also hear your console on your home theater speakers without disconnecting the optical cable from the transmitter.

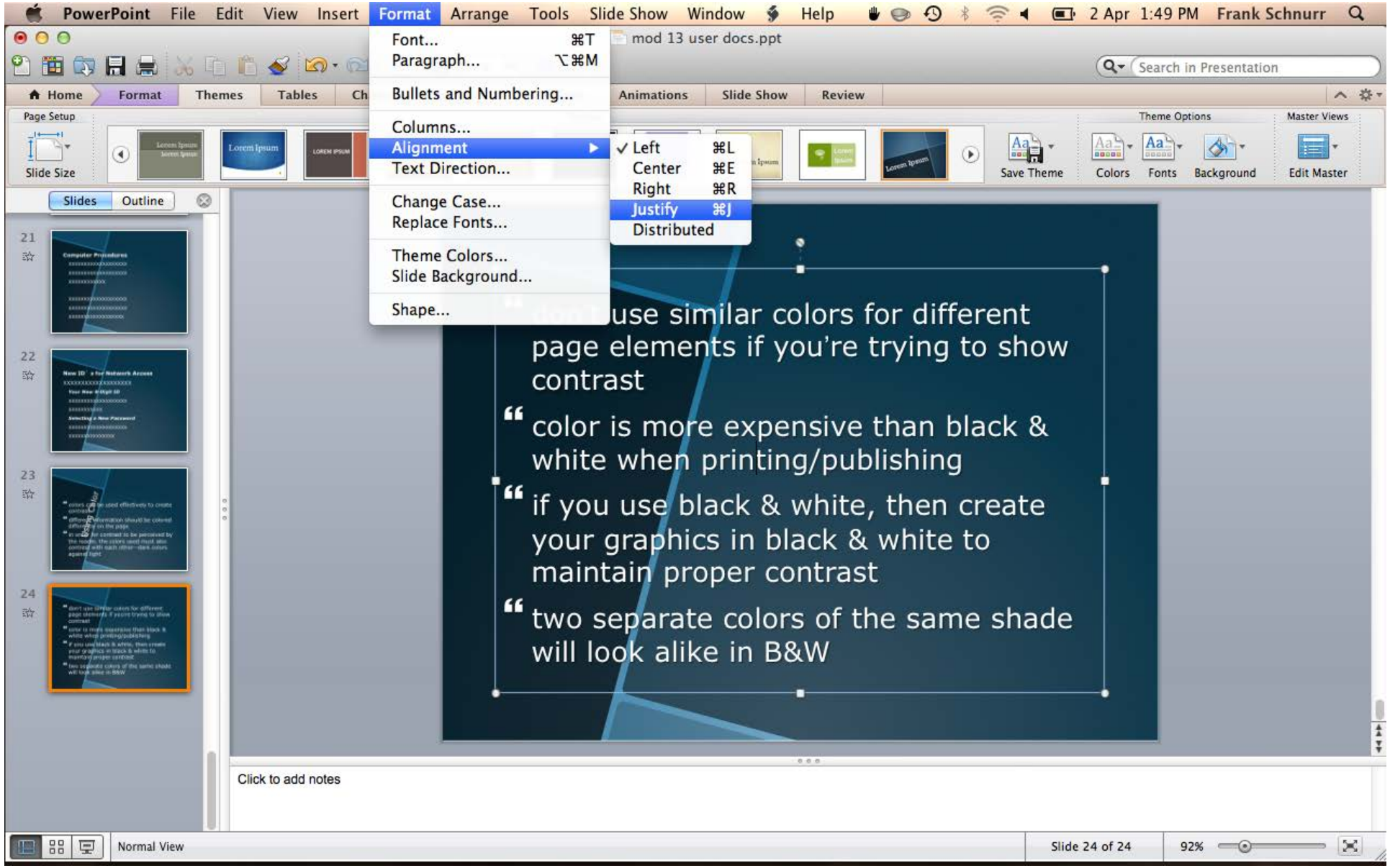
Connecting the XP400 transmitter digital output to your home theater system will pass your console's game audio from the transmitter's digital input to the home theater A/V receiver digital input, so you can hear the game audio on your XP400 headset and your surround sound speakers at the same time. To hear the game audio only on the XP400 headset, turn down or mute your speakers.



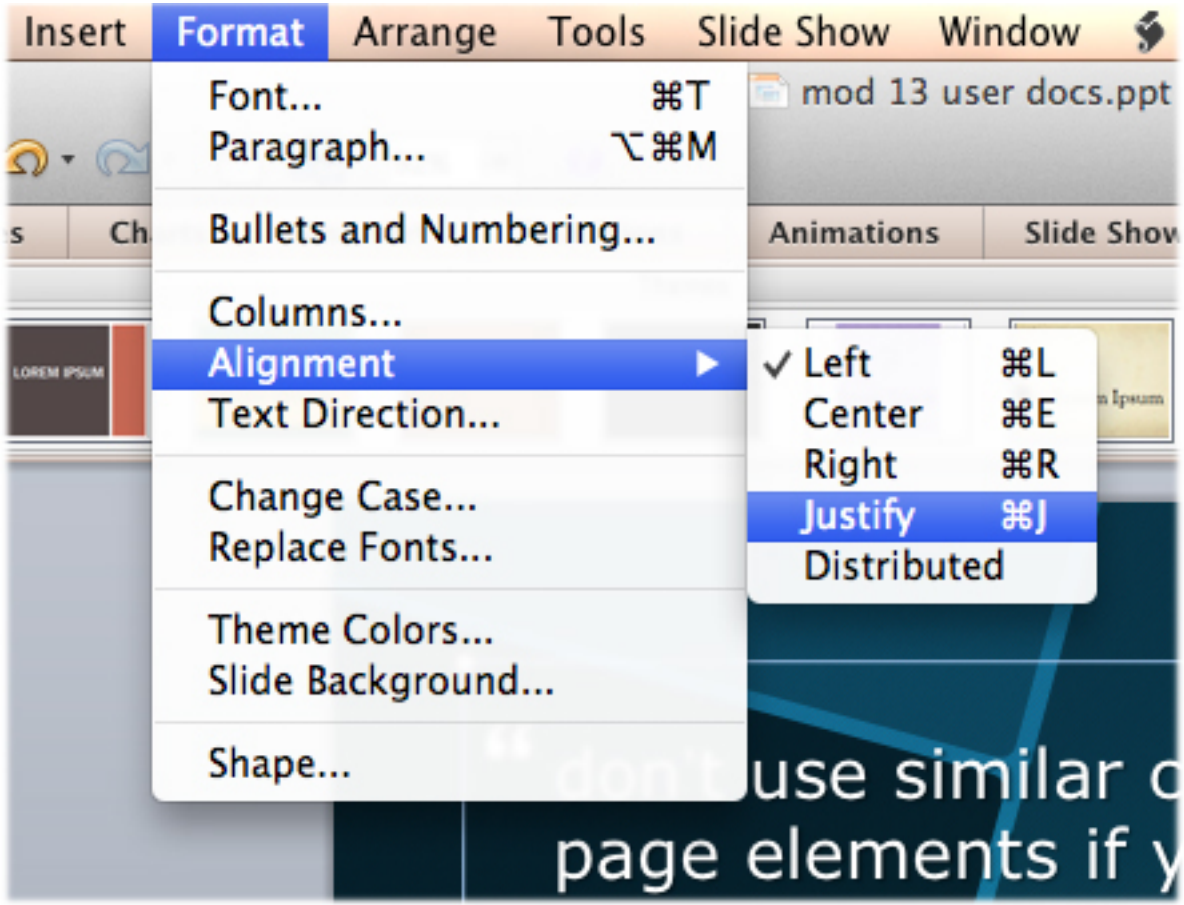
*** Whenever a DIGITAL INPUT is detected, the ANALOG INPUT is turned OFF. So if you have your TV plugged into the ANALOG IN jack, you won't hear it if your game console is transmitting digital audio to the transmitter.**

Software Screenshot Guidelines

- Screenshots show what the user should see
- Need to be cropped appropriately
- No cropping = too much info
- Over-cropping = no orientation info
- Need to be sized appropriately – not too big nor too little


PowerPoint File Edit View Insert Format Arrange Tools Slide Show Window Help 2 Apr 1:49 PM Frank Schnurr
mod 13 user docs.ppt
Search in Presentation
Font... ⌘T
Paragraph... ⌥⌘M
Bullets and Numbering...
Columns...
Alignment
Text Direction...
Change Case...
Replace Fonts...
Theme Colors...
Slide Background...
Shape...
Left ⌘L
Center ⌘E
Right ⌘R
Justify ⌘J
Distributed
Home Format Themes Tables Animations Slide Show Review
Page Setup
Slide Size
Save Theme
Theme Options
Colors
Fonts
Background
Master Views
Edit Master
Slides Outline
21
22
23
24
use similar colors for different page elements if you're trying to show contrast
color is more expensive than black & white when printing/publishing
if you use black & white, then create your graphics in black & white to maintain proper contrast
two separate colors of the same shade will look alike in B&W
Click to add notes
Normal View
Slide 24 of 24
92%

A cropped screenshot draws attention to a specific area of the screen



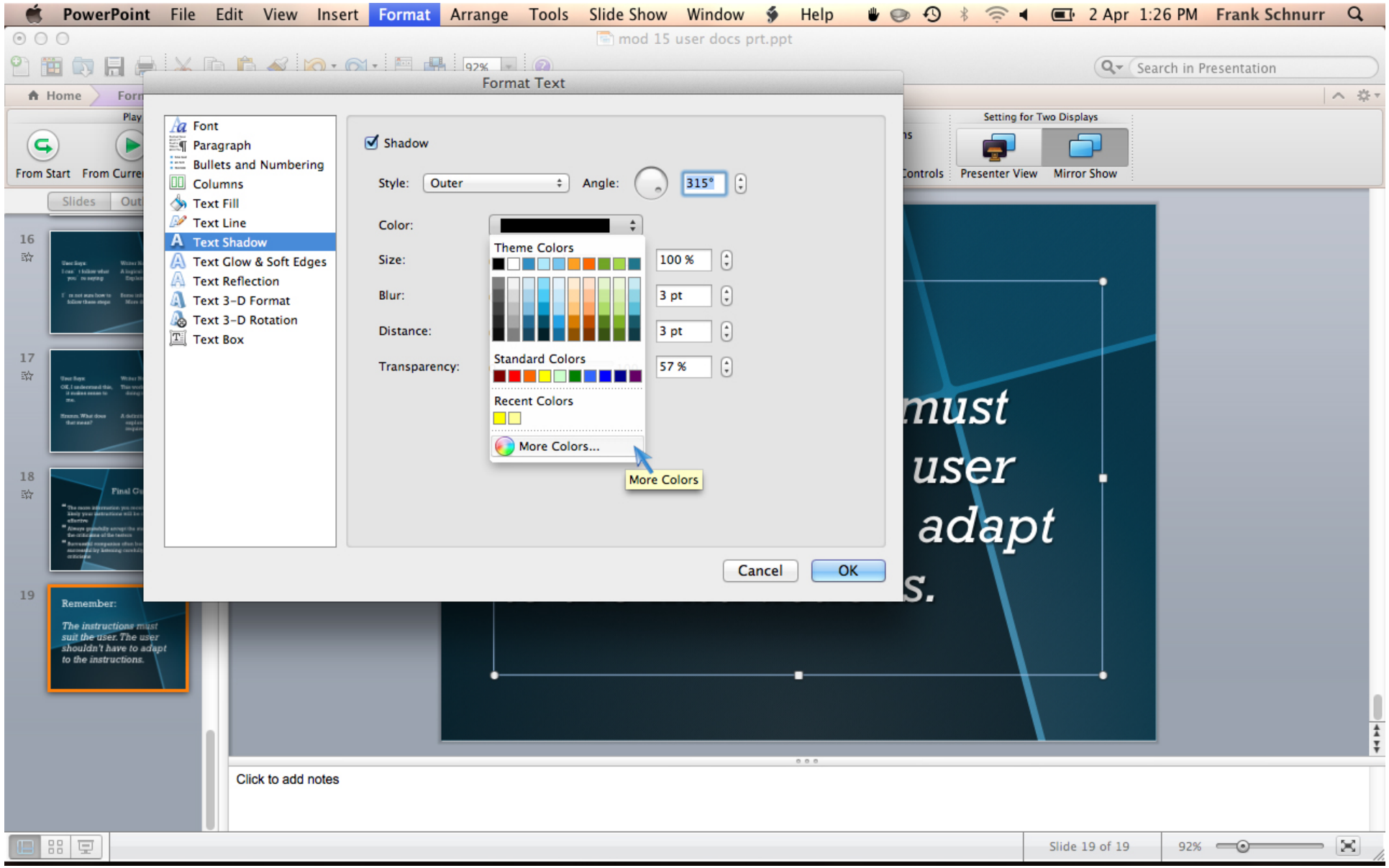
Graphics Provide Feedback

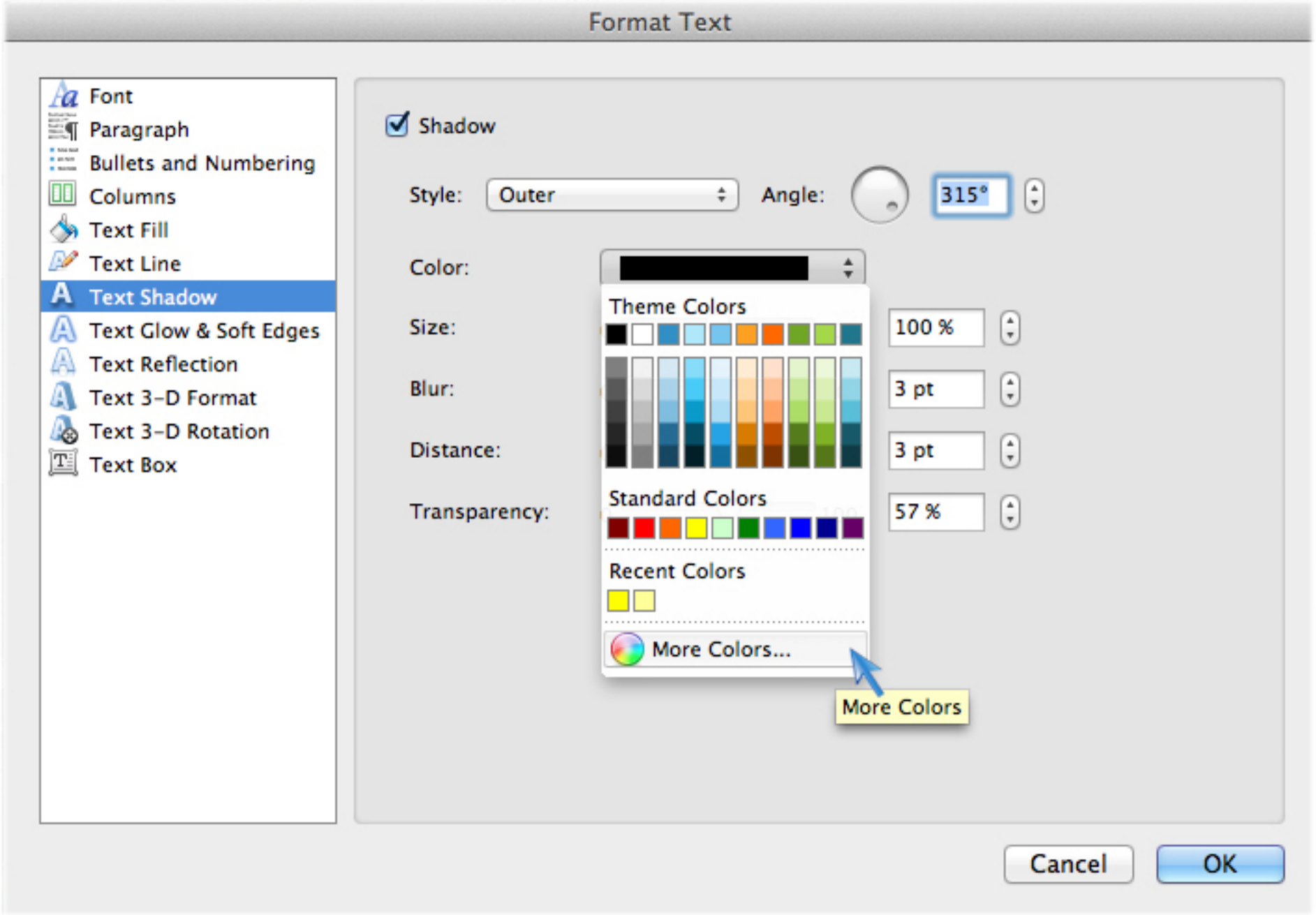
- Graphics provide users with visual feedback on their progress
- Graphics can show users what they should be seeing at each step
- If your screenshot and their screen don’t match, they can back-track

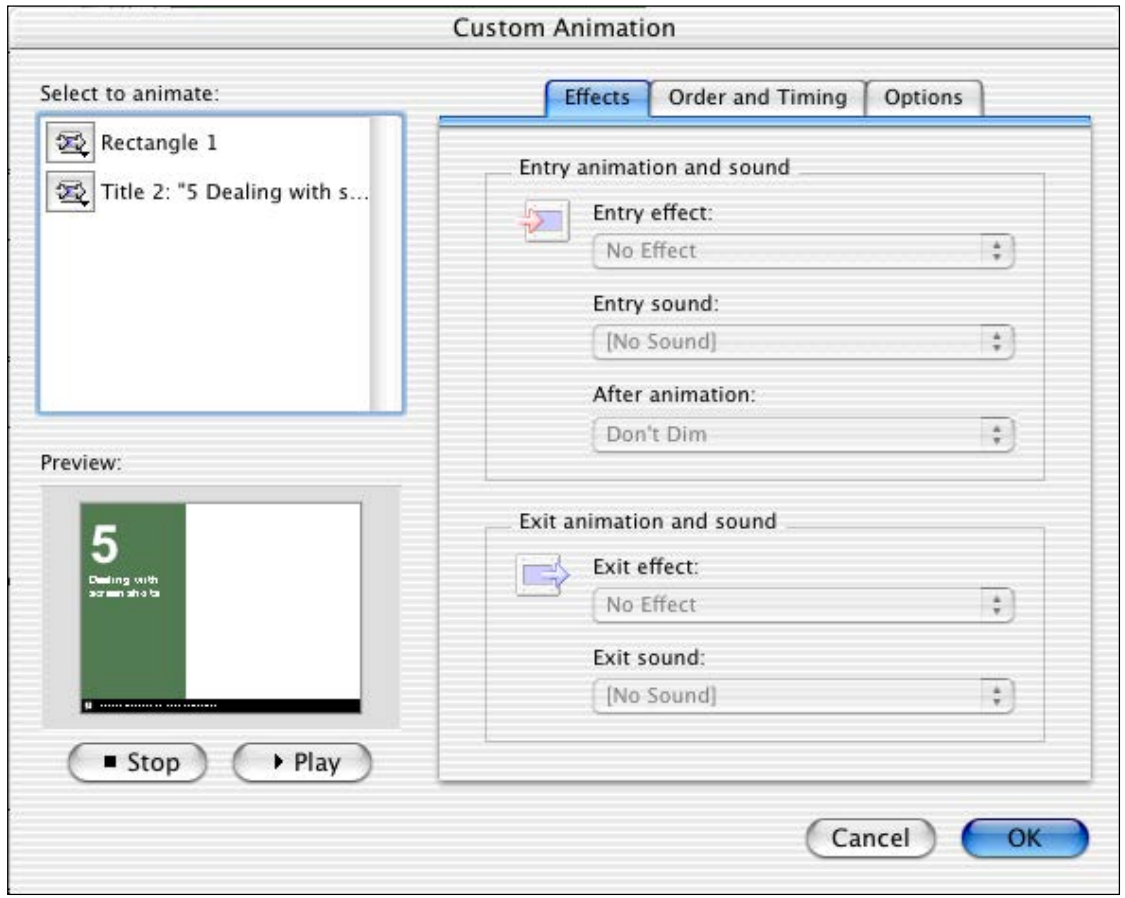
Use Graphics to Direct Users

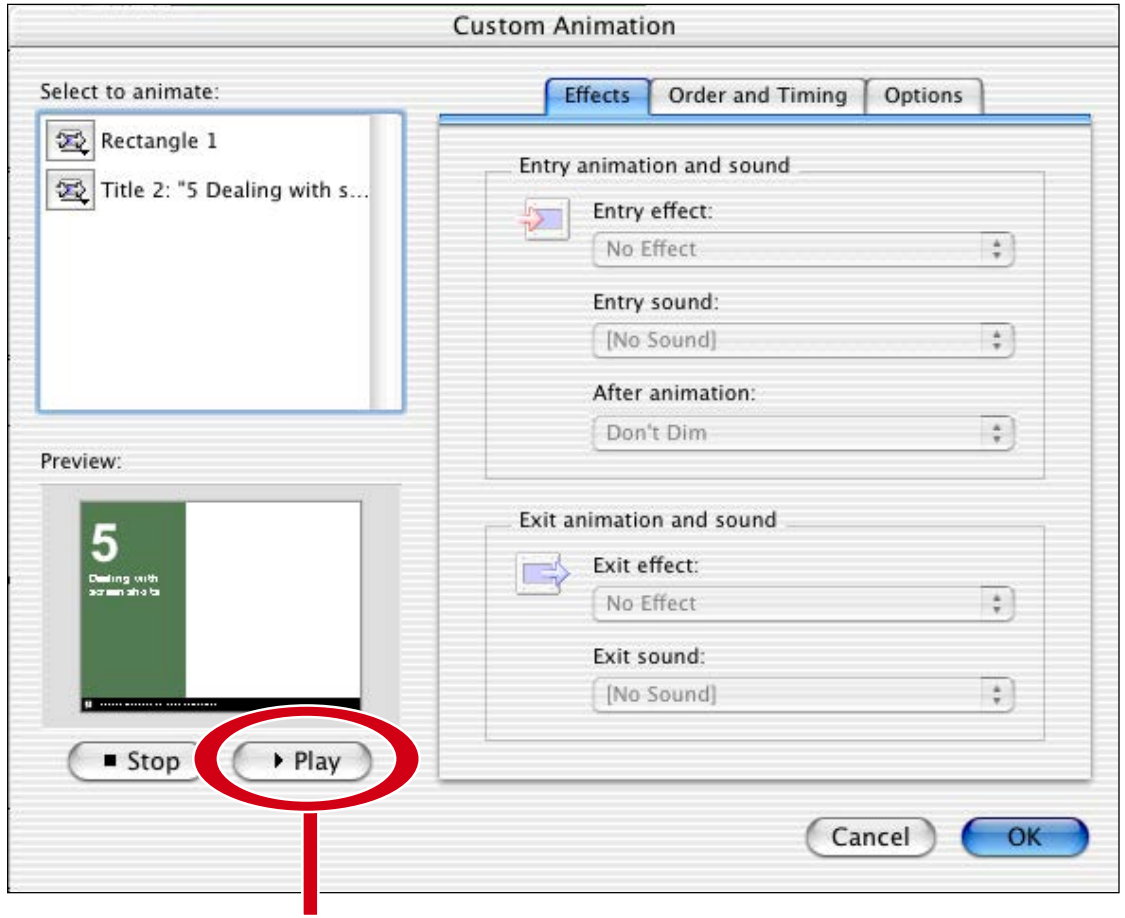
- Use graphics to show direct users on how to interact with the GUI
- This saves several separate steps which would be required by using text alone
- Use graphics to show buttons, pull-down menus, and any features the walkthrough suggests might be useful

- Use screenshots when the information on the screen is complex
- E.g. a pop-up window may appear on the screen, requiring multiple inputs
- A screenshot allows the reader to make sense of complex info and manipulate it correctly


PowerPoint File Edit View Insert Format Arrange Tools Slide Show Window Help 2 Apr 1:26 PM Frank Schnurr
mod 15 user docs prt.ppt
Search in Presentation
Format Text
Font
Paragraph
Bullets and Numbering
Columns
Text Fill
Text Line
Text Shadow
Text Glow & Soft Edges
Text Reflection
Text 3-D Format
Text 3-D Rotation
Text Box
Shadow
Style: Outer
Angle: 315°
Color:
Size: 100 %
Blur: 3 pt
Distance: 3 pt
Transparency: 57 %
Theme Colors
Standard Colors
Recent Colors
More Colors...
More Colors
Cancel
OK
Setting for Two Displays
Presenter View
Mirror Show
Remember:
The instructions must suit the user. The user shouldn't have to adapt to the instructions.
must
user
adapt
s.
Click to add notes
Slide 19 of 19
92%


Format Text
Font
Paragraph
Bullets and Numbering
Columns
Text Fill
Text Line
Text Shadow
Text Glow & Soft Edges
Text Reflection
Text 3-D Format
Text 3-D Rotation
Text Box
Shadow
Style:
Outer
Angle:
315°
Color:
Size:
100 %
Blur:
3 pt
Distance:
3 pt
Transparency:
57 %
Theme Colors
Standard Colors
Recent Colors
More Colors...
More Colors
Cancel
OK


Custom Animation
Select to animate:
Rectangle 1
Title 2: "5 Dealing with s...
Preview:
5
Stop
Play
Effects
Order and Timing
Options
Entry animation and sound
Entry effect:
No Effect
Entry sound:
[No Sound]
After animation:
Don't Dim
Exit animation and sound
Exit effect:
No Effect
Exit sound:
[No Sound]
Cancel
OK



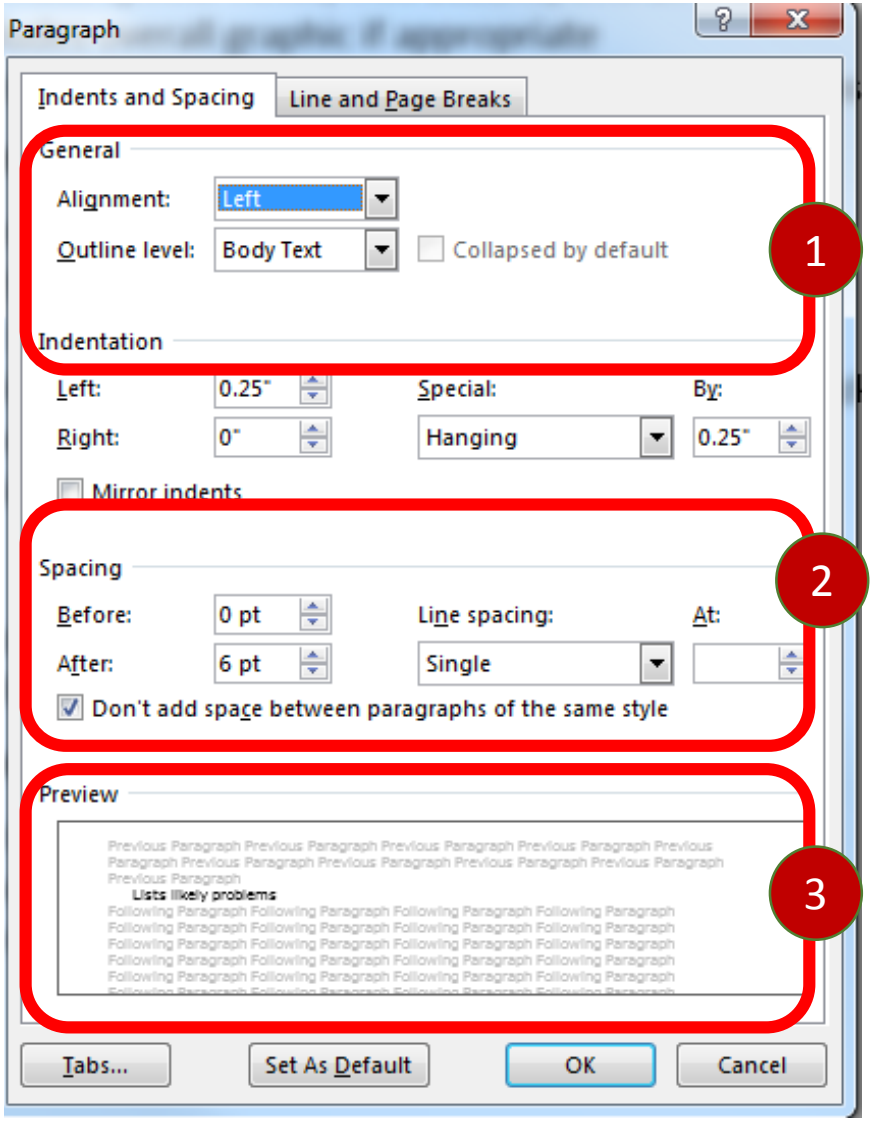
To preview slide animation, click Play.

Use shapes and numbers to quickly guide users

1. This section is for……

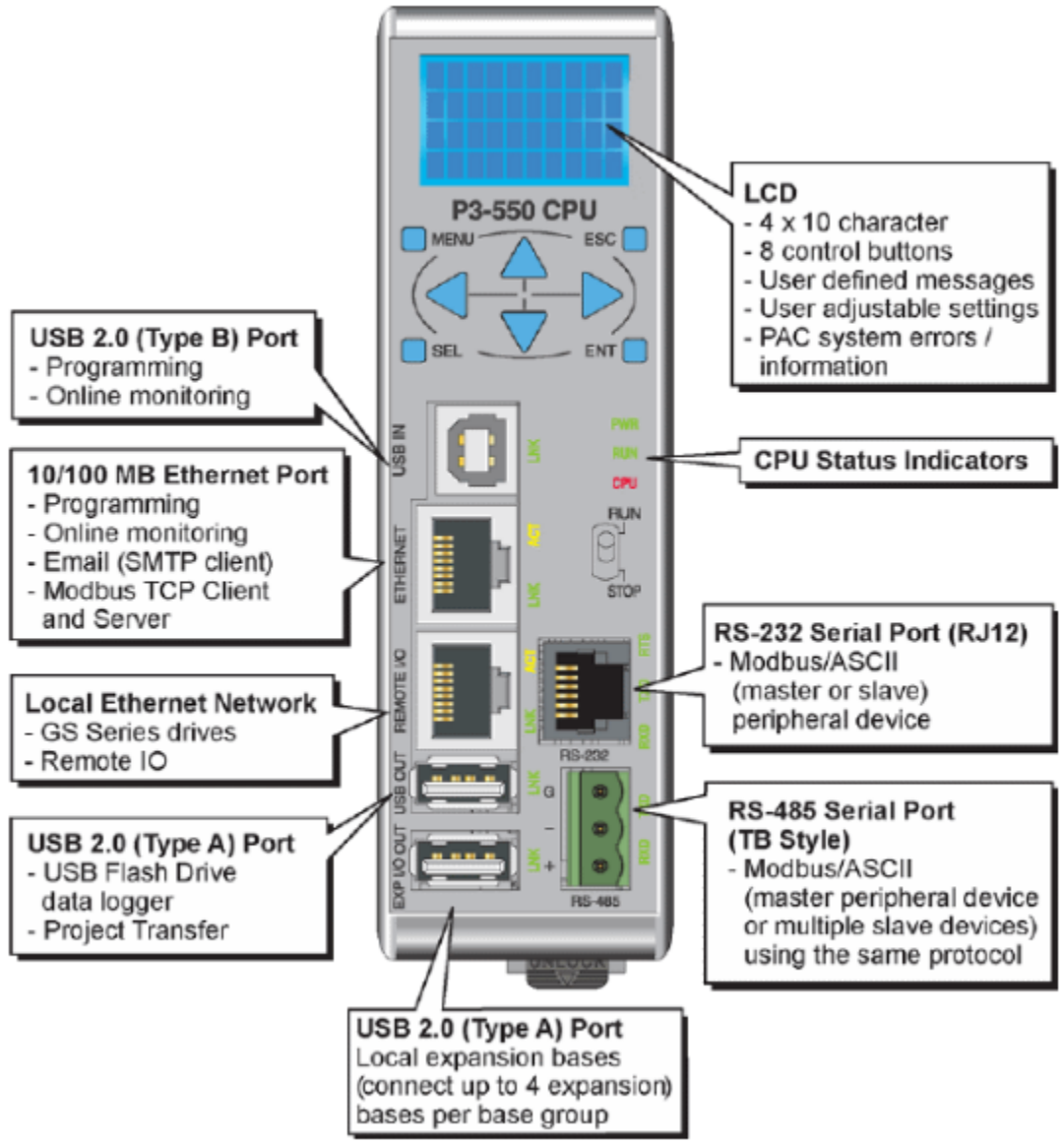
2. This section is for……

3. This section is for……



Use call-outs where necessary

- Graphics also direct the reader to specific items or locations
- A call-out consists of an arrow connecting a brief text explanation to a graphic
- Call-outs both identify an object and direct the reader to it


P3-550 CPU
MENU
ESC
SEL
ENT
USB IN
ETHERNET
REMOTE IO
USB OUT
EXP I/O OUT
LNK
ACT
PWR
RUN
CPU
RUN
STOP
RTS
TXD
RXD
RS-232
G
–
+
RS-485
LCD
- 4 x 10 character
- 8 control buttons
- User defined messages
- User adjustable settings
- PAC system errors / information
CPU Status Indicators
USB 2.0 (Type B) Port
- Programming
- Online monitoring
10/100 MB Ethernet Port
- Programming
- Online monitoring
- Email (SMTP client)
- Modbus TCP Client and Server
Local Ethernet Network
- GS Series drives
- Remote IO
USB 2.0 (Type A) Port
- USB Flash Drive data logger
- Project Transfer
RS-232 Serial Port (RJ12)
- Modbus/ASCII (master or slave) peripheral device
RS-485 Serial Port (TB Style)
- Modbus/ASCII (master peripheral device or multiple slave devices) using the same protocol
USB 2.0 (Type A) Port
Local expansion bases (connect up to 4 expansion) bases per base group

Place Graphics Close to Text

- Graphic should be placed close to the text related to it
- Close placement makes the graphic easier to use and increases comprehension
- Close placement eliminates the need to label the graphic
- Note: some readers might expect labels, so write accordingly
  - For this assignment, label as Figure 1, Figure 2……
  - No need for List of Figures though

What part of graphics to focus on?

- What needs to be seen?
- How much of screen?
- Why?
- What is the purpose of the graphic?

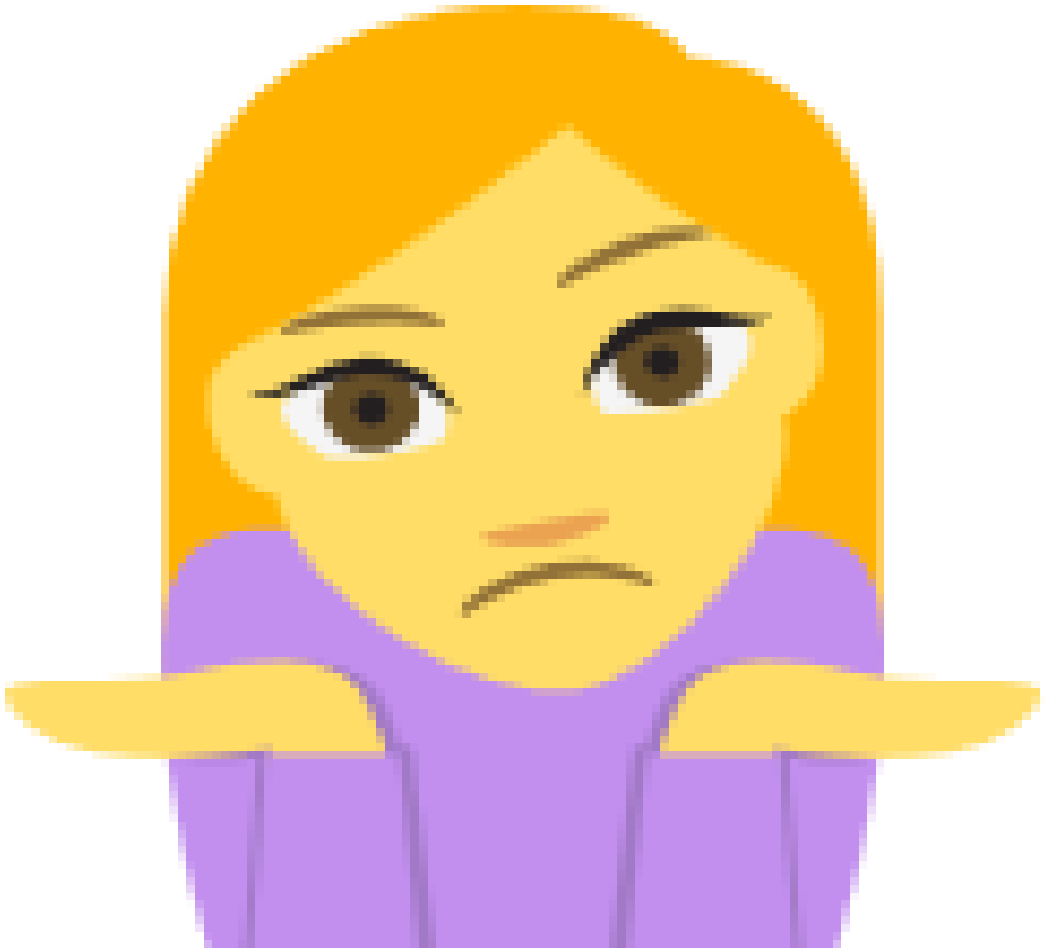
Windows users - screenshots

- Use the Snipping Tool for easy screenshots
- To capture a drop down menu:
  - Open Snipping
  - Press Esc
  - Click on the drop down
  - Press Ctrl-PrtSc
  - Snip

Mac users - screenshots

- Command-Shift-4 is the magic combo
- Perform drop down function then press the keys
- Drag cursor to take image
    - Saved on desktop usually

Linux users - screenshots



Testing

Testing Your Instructions

- Test your instructions with people who have never done the procedure
- Watch them ‘step through’ the instructions and give feedback
- Rewrite your instructions and retest with new subjects

Three basic types of tests: software instructions

1. Performance: whether people are able to complete the instructions
2. Understanding: whether something is unclear, or if they have to re-read
3. User access: whether users are able to find needed information quickly & easily

Read-Aloud, Think-Aloud Protocols

- The users of the instructions read them aloud and tell observers what they are thinking
- Testers then have a better idea of how users actually understand and make use of the instructions

Think-Aloud Protocols (TAPS)

- The user: reports thoughts and breakdowns in thought

- The writer:
  - observes
  - notes problems for later revision
  - resists intervening in the user's progress

Guidelines for using TAPS

Comprehension Problems

User Says:	Writer Notes:
I have to re-read this sentence to understand it	Make it more straightforward? Change words?
I’m not sure how to follow these steps	Some info is missing. More details needed

A running commentary is often used

User Says:	Writer Notes:
OK, I understand this, it makes sense to me.	This works! What am I doing right?
Hmmm. What does that mean?	A definition or explanation is required

Even Bad Feedback is Good

- The more feedback, the better your instructions will be
- Always gratefully accept the criticisms of the testers
- Successful companies often become successful by listening to user criticism

Remember:

The instructions must suit the user.

The user shouldn't have to adapt to the instructions.

Work on the Word task from yesterday

- Work with partner from yesterday. Use your ShareFile walkthrough
- Create instructions with screenshots in a new Word file
- Label accordingly (Use shape highlights)
- Upload to ShareFile