The Usability of Layout: Advanced Visual Editing

TC World 2012

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Agenda

- The Usability Argument for Good Layout
- Design Concepts: PARCH
- Other Design Best Practices
- Applying the Rules
- Conclusion and Discussion
The Usability Argument for Good Layout

Why this is important…
Poor design has a cost.

- Users can’t find information.
- Users can’t correctly identify information.
- Users misunderstand relationships of elements on the page.
- Users miss subtle cues when scanning.
- Bottom line: documentation has taken a large step backwards!
and completion of installation. If any problems occur during installation, contact technical support:

**Configuring xTract**

Once you have configured the xTract node on your PC, you do not need to reconfigure it unless:

- a communication error occurs,
- there is not enough memory or other system resources to run the node properly, or
- there is a conflict with another application.

If any of these occur, follow these steps:

1. Check the status of the xTract node (from Tools | Status Report, click Ping Check). If the node is active, shut it down (from Node Action, select Terminate).
2. Close all other applications.
3. Run the Configurator (Start | Programs | xTract | Config).
4. Changes the settings as needed (see p. 22 for details).
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Design affects usability.

Overall document design should:

- Be appropriate for how and where the user uses it.
- Support the meaning of the content.
- Make information more accessible and usable.
Design Concepts: PARCH

A handy way to remember!
PARCH

- Proximity
- Alignment
- Repetition
- Contrast
- Hierarchies and dependencies
Proximity

- Things that are close together have an implied relationship.

To open multiple files, right-click each file while pressing Ctrl.

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Alignment

- Lining up elements intentionally produces a clean, well-designed page.
Repetition

- Repeated visual patterns help users access information.
- Repetition reinforces intentional design meaning.
- Consider:
  - colors
  - placement on page (for example, always having an example in the same spot)
  - icons
  - even “NA” elements
Contrast

- Contrast is necessary to focus the reader’s attention on something.

- Consider:
  - visually distinct headings vs. text
  - callouts and annotations
  - distinct spot color
  - main text vs. layered info
Hierarchies

- Users subconsciously understand the relationship of elements based on the white space and indents.

This is the parent information.
This belongs to the parent.
This belongs to the parent.

This appears to be at a higher level than the original parent.
Other Design Best Practices

Learn the guidelines…
Design Elements

- Fonts
- White space
- Chunking
- Nesting
- Plumb lines
- Paragraphs
- Headings
- Graphic elements
Fonts

- Font = type face + pt size + font characteristic
- Serif vs. sans serif typefaces
- Variable-width vs. mono-spaced typefaces
- Kerning: how close letters sit to each other
- Don’t mix font languages (TrueType, PostScript, etc.) in a document!
- Fonts with meaning

Danger! Turn the unit off before cleaning. Opening a running unit can lead to electrocution and death.
White Space

- Also known as “negative space” (anything on the page without ink).
- It is a powerful visual element.
- You need at least 40% to make things readable.
- Shows the relationship of elements on the page through:
  - chunking
  - nesting
  - plumb lines
Chunking

- Using white space to show logical visual “chunks” of information.

1. Create a user account, add a photo, and add personal details (name, department, etc.).
2. Upload the first files for data collection and assessment before adding any comments.
3. Call your mother before lunch!

1. Create a user account, add a photo, and add personal details (name, department, etc.).
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Nesting

- The logical hierarchies of information.

1. Create a user account with the following items:
   - photo
   - name
   - department
   - ID tag number

2. Upload the first files for data collection and assessment before adding any comments.

3. Call your mother before lunch!
Nesting, cont.

- The illogical organization of information, such falsely breaking down a topic into a single subtopic.

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**Cats**
- *History of Cats in Culture*
  - Ancient Egypt
  - Babylonia
  - Europe in the Middle Ages
  - Hollywood
- *Breeds*
  - Siamese
  - *Diet and Health*
Plumb Lines

- Virtual vertical lines at every margin point.
Paragraphs

- Flush left, ragged right
- Single line spacing, white space between

the field’s purpose and function. Each field must have full error correction messages which clearly explain the entry error. No number codes should be used in place of explanatory text.

No more than 12 elements should be included in a single dialog box; no more than six elements should appear within a single grouping…
Indents

no indent (flush left)

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indent (don’t use in TC docs)

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hanging indent (hazards, lists, etc.)

TIP: No more than 12 elements should be included in a single dialog box; no more than six elements should appear within a single grouping…

plumb line for first line

plumb line for all others
the field’s purpose and function. Each field must have full error correction messages which clearly explain the entry error. No number codes should be used in place of explanatory text.

Dialog Box Grouping and Spacing

No more than 12 elements should be included in a single dialog box; no more than six elements should appear within a single grouping…
Graphic Elements

- Consider what you can add to improve signposting.
- See if there is a budget for spot color.
- Be creative if it helps communicate.
- General design tip: don’t design for exceptions!
Applying the Rules

Designing is more difficult in some DTPs.
Design your template as a whole.

- Start with the overall page:
  - Think about where and how it will be used.
  - Everything is proportional to page size.
  - Use real ("snap-to") values on ruler (for example, 1.25 cm, not 1.27).

- Thing of how styles fit together:
  - Use white space only above to allow mating.
  - Never allow headings to float.
  - Turn off almost all automatic formatting.
  - Start with a base style that is based on None.
Conclusion and Discussion

Questions?
Recommendations

1. **Learn about design.**
   Study more about typefaces, page layout, etc.

2. **Get involved with the document design.**
   Work with developers and designers to improve how the automated presentation (.css, etc.) works.

3. **Experiment.**
   Don’t be afraid to try some different designs.
Thank you!

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A butter approach to TC…

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