The User Edit Method

When a Usability Method Fulfills a Technical Communication Need

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Abstract

- The User Edit (also known as the Usability Edit) is a usability method that can find usability issues and errors in documentation. This method is easy to learn and will assist the technical communicator with becoming more proficient with User-Centred Design (UCD) methods.

  This particular method is relevant within the self-service environment where requirements are now placed on technical communicators to verify the usability of products for customers.
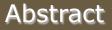
Overview

- User Edit Method
  — Introduction, overview, context, and when to use

- Types of the Method
  — Think Aloud
  — Marked Up Pages

- Exercise to use the method

- Advantages

- Disadvantages

Overview

- Description and explanation of this method.

- This method is a striking example of a self-service method within the new confines of our profession, but…

- Has anyone ever hear of this method?

- Why this particular method never really gained traction or understanding within the usability profession or within the technical communication field.

User Edit – Introduction

- The User (of Usability) Edit is a very specific (if somewhat unknown) method for performing usability evaluations on documentation. (Atlas, p. 28)

- This method was 'created' by Marshall Atlas in 1981. He documented the process in a journal, though variants of this method existed previously – particularly in military uses and potentially within companies (but secret).

- The author did a retrospective in 1998 wondering why the method was not well known or used within the usability field.

User Edit – Overview

- "The user edit is perhaps the most powerful tool for finding usability problems in documentation." (Wilson, p. TBD)

- The User Edit is "fast, cheap, easy, and powerful, yielding a lot of information for very little effort." (Atlas, p. 28)

User Edit – Overview

- According to Wishbow: "…In two easily digested pages, Atlas accomplishes for words what Tufte's 'friendly' and 'unfriendly' principles (Tufte, p. 183) accomplish for graphics." (Wishbow, p. 15)

Overview

- The User Edit method - includes several elements of traditional usability testing, but with a very direct and narrow focus.

- Overlapping concepts and ideas work for both.

  One reviewer described the user edit and the initial Atlas article as: "one of the best 'sound bites' on usability testing I've ever read." (Wishbow, p. 15)
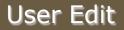
User Edit – Overview

- Regarding the issues the method can uncover, according "to Atlas, are:

  - Missing instructions (absent procedures)
  - Misleading instructions (badly written, if accurate, procedures)
  - Badly design instructions (well-written, badly designed procedures
  - Had access mechanisms (table of contents and index)"

    (Wishbow, p. 15-16)

User Edit – Overview

- Since the errors of omission in the documentation will be rather obvious, you can often uncover the biggest problems with only one or two users performing this method. (Atlas, p. 28)

- Can use additional users (up to about 5), but most issues found with first one or two users.

User Edit – Overview

- Preference if for users who know the area the documentation covering, but really can have anyone act as user.

- The method works optimally when documentation and software are in a somewhat stable/near completion state.

User Edit - Overview

- The User Edit Method is particularly useful to find:
  - Missing information
  - Incorrect information
  - Missing steps in a procedure
  - Too many steps in a procedure
  - Poor or missing examples
  - Ambiguous information
  - Difficult terminology (or technical jargon)
  - Usefulness of visuals within documentation
  - Usefulness of examples

                              (Wilson, p. TBD)

User Edit – Overview

Warning!

Prior to using the user edit method– <u>always</u> fix the most obvious production issues – typos, improper spelling, layout issues so that user do not focus on this and concentrates on the particular procedure itself.

Otherwise, will not get a true review of the document's usefulness

User Edit – Documentation Types

Good Documentation Type to Test	Poor Documentation Type to Test
Procedural/task-based	Conceptual
Installation	Reference

User Edit – Documentation Types

- The User Edit Method could be useful in the following situations:
  - — Installation procedures that are required
  - — Consumer products that must be clear, simple, and concise
  - — Is the procedure/product have a reputation for difficulty?
  - — Does the product/Web site have a check out or similar ending step?
  - — Is the procedures particularly complex and require EXACT following of steps to ensure success?

                                    (Wilson, p. TBD)

User Edit – Variants of the Methods

- Think Aloud Version

- Marked Up Pages

User Edit – Think Aloud Method

- Think Aloud
  - Similar to the traditional usability test where you ask participant to think aloud as they work and record their thoughts, ideas, and information during the procedure.

  - With this method, it does require similar interaction between the facilitator and participants – so an initial protocol, understanding of how to interact during the test, and how to debrief and talk after the test is complete.

  - You have the participant sit with the product and documentation and read and perform the tasks while talking out loud. This involves having the participant mention his/her thoughts while performing the task.

User Edit – Think Aloud Method

- Think Aloud (Continued)
  - With this method, need as a minimum a facilitator and a note taker [besides the participant.]

  - This method entails extensive note taking and sometimes a video recorder of the session to obtain all the verbal and non verbal information from the participant.

    If you do this, you will sometimes need a separate room to not disturb others.

  - This method also will require much post-test work to understand, decipher, and analyze the participant's findings and work.

User Edit – Marked Up Pages Method

- Marked Up Pages
  - This method is less focused on the participant thinking out loud and entails giving the participant a hard copy of the documentation (either a book or printed out version of an online version of the documentation).

  - The participant than marks up the documentation when they think it is incorrect, unclear, or ambiguous.

  - The usefulness of graphics, illustrations, and examples can also be tested in this variant especially well.

User Edit – Marked Up Pages Method

- Marked Up Pages (Continued)
  - Often you create a set of specific codes and symbols to mark up the documentation; for example, if the documentation is missing information or just ambiguous there would be different symbols.

  - Could write up these markings (or whatever ones you choose) on an index card or piece of paper to give to the participant.

User Edit – Marked Up Pages Method

- Marked Up Pages – Examples of how to do mark up:

  — Write in missing steps
  — Circle undefined terms
  — Make a notation where examples would help
  — Cross out extra or redundant information
  — Use an exclamation point for particularly helpful content
  — Write up where you would find mismatches between the product software and the documentation. (Wilson, p. TBD)

User Edit – Marked Up Method (Card)

- Write in missing steps or index entries
- Circle undefined terms
- Underline ambiguous or confusing sections
- Put a star ✳ where examples would help
- Cross out extraneous or redundant information
- Put a large exclamation point at the end of information that
  was especially helpful !
- Describe briefly in writing any mismatches you find
  between the product interface and the documentation (for
  example the label for a button is different in the product
  than it is in the documentation)

(Wilson, p. TBD)

User Edit – Exercise

- In class 'tutorial' on using the method to evaluate a piece of documentation.

User Edit – Advantages

- Use with online and/or hardcopy documentation
- Often finds issues technical reviewers miss
- Based on usability methods known to practitioners
- Cost and learning time is minimal
- Use existing software/documentation available
- Find major problems with few participants
- You do not need a dedicated lab (general office ok)
- Needed tools (recorder, video camera) often available
- Get feedback on the visual elements of the documentation   (Wilson, p. TBD)

User Edit – Disadvantages

- Requires all focus on the documentation – which is often not a realistic expectation or setting

- Provides a list of very detailed feedback on a particular step, but the scope is very narrow as well

- This method can be time consuming if you have many sets of tasks and sub tasks to complete

- Potentially huge data analysis – if participants mentioned different missing pieces

- Not a method known to the wider usability practitioner profession (Wilson, p. TBD)

User Edit – Example

- The following example is a installation guide that used the User Edit method to understand the needs of users to install a PCI card in a UNIX machine.

- After testing, documentation changed from a 40 page installation guide (book) to a poster with 16 pages/block listing how to install the software and the hardware.

- Result was more visual, cheaper translation costs, and less taxing for user – as installation was easier to follow.

The Future – How this Method is Relevant Today

- Technical Communications is changing. We will deliver more video, audio, and new formats – the "YouTube generation".

- The move away from linear books/help is moving exponentially faster the last several years.

- This method helps us by providing cost-effective usability method specifically geared for improving documentation.

The Future – How this Method is Relevant Today

- The newest generation of engineers/developers (Gen Y) are used to and demand – and will develop -- much more usable products.

- Technical communicators must position yourself and follow this next generation to remain relevant.
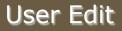
The Future – How this Method is Relevant Today

- Having some usability experience – such as helping with a usability test or performing the User Edit – is often a great additional piece of experience to have as a technical communicator.

- Increasingly these types of methods/skills are part of the technical communicator's core competencies/requirements.

- Often, this variety of experience is the differentiator when you are applying for jobs or saving a job from redundancy when other qualifications are equal.

The Future – How this Method is Relevant Today

- "Of course, our notions of usability have evolved since Atlas's article." (Schriver, p. 11)

- User edit is a great way to verify that the content you are providing to customers is accurate to them.

- "While users in the 1980s expressed the need for usable documents that were more technically accurate, readers in the 1990s have asked for more than simple usable documents." (Schriver, p. 11)

- The 00s…

User Edit - Conclusion

- This is a particularly good method for testing procedural and installation documentation. The participant will quickly find missing or ambiguous information.

- This is a solid method to test your documentation that does not require many of the more expensive aspects of traditional usability testing.

- You do not need many users and often inexperienced or novice users are fine participants.

- You can perform the test informally in an office setting.

User Edit - Conclusion

- Anyone who needs to perform usability reviews on documentation can use this self-service method to evaluate user assistance and usability on a variety of products with minimal training, users, cost, or time commitment.

- "Atlas' article is remarkable in that it is one of the first publications to give writers a practical method for adapting their work to their audience." (Wishbow, p. 19)

User Edit - Conclusion

- "Perhaps the greatest strength of the user edit is that it is based upon a much-tested, much-critiqued, and by now accepted research method in cognitive science. This research method, protocol analysis, has long been used to help researchers study the problem solving strategies used by people in all sorts of domains." (Wishbow, p. 18)

Conclusion

- Special thank you to Chauncey Wilson – my current manager and mentor who taught me about this method and how useful it can be in particular situations.

Contacting Me

- Please contact me if you have any questions about this lecture, the user/usability edit, etc.

- Please either email me (c.laroche@neu.edu) if you have any questions or comments.

- Thank you

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