



TO: Dr. Gregory Wickliff
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Project 1 Assessment Memo
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Team members of Group 1 for Project 1 were Rebekah Crosson, Dorothy Knosby, and Anne Moore. The team members are all graduate students with extensive writing experience and are professional teachers. Dorothy was new to InDesign although she had excellent Photoshop skills. Rebekah had some previous InDesign experience. Anne had recent InDesign experience since she had taken the Information Design and Digital Publishing course in the fall. Dorothy and Rebekah quickly mastered the basics of InDesign the very first week we were working on the project. Our task was to develop a tutorial to teach novice InDesign users who are technical and professional writing students at UNC Charlotte. We outline the tasks we covered in our tutorial below.

Process

As Anne had the most experience with InDesign, she maintained the master InDesign document. Dorothy was the Photoshop expert and edited some images that required more manipulation than just cropping. We reviewed the various techniques for taking screenshots from Windows devices. After the initial draft, we named and saved our screenshots as high quality .pngs for maximum clarity. Rebekah was the text expert and wrote major sections of the documents we worked on in class such as the Planning Memo, Combined Analysis and Revision Plan, Usability Tests 1 and 2 Report, Usability Test 3 Report, and Peer Review Report.

We divided up the tasks to be covered in our tutorial as follows and at each step we were responsible for editing our own sections:

1. Anne Moore: Following the instructions, the participant will open Adobe™ InDesign® 2022 and create a new letter-sized document. They will name their completed file and save it in Adobe™ InDesign® 2022.
2. Anne Moore: The participants will create a textbox and fill it with placeholder text.
3. Dorothy Knosby: The participants will create a heading style in a specific typographic style.

4. Dorothy Knosby: The participants will apply the new style to headings in the document and name the new style.
5. Rebekah Crosson: The participants will create a paragraph style.
6. Rebekah Crosson: The participants will apply the paragraph style to the text in a textbox.
7. Anne Moore: The participants will use the parent page function to apply page numbers and a running header to the document.

We composed all of our memos and documents other than the tutorial itself in Google Docs because that allowed us to work collaboratively on our writing tasks. We were all heavy users of Google Docs and excellent writers, so the writing process went smoothly. Once we finished a memo, we each downloaded it to our personal drive as a Microsoft Word document and then as a pdf. Anne submitted the memos during class, but Rebekah and Dorothy also uploaded them to Canvas before the deadline.

We began writing the text for the InDesign tutorial in Microsoft Word. We quickly found that we had to reformat it significantly once it was in a textbox in InDesign, so after the initial copying and pasting, we performed most of the editing directly in the InDesign document.

We agreed to use the terms “drop-down menu” for the options across the top of InDesign, “toolbar” for the source of major tools on the left, and “panel” for all of the other tabs or menus that appear when you select a tool from the “drop-down menu.” We used imperative language throughout, except for in the notes and comments, which were more informal.

Usability Test Mechanics

For the first two usability tests, we had Group 2 members use InDesign on one of our laptops and scroll through the tutorial on another of our laptops. This approach proved to be very challenging for the participant because they had to scroll through the InDesign file and look back and forth to the open InDesign file on the other laptop to perform the task. For the third usability test, we printed out the pdf of the tutorial and the individual turned the pages while performing the tasks on one of our laptops that had a pristine InDesign interface. Giving the participant a printed version of the tutorial while they worked on a laptop worked much better. When we asked the follow-up questions, the participant had to flip back through the pages to locate problem areas, but they had to scroll on-screen using the other method. Asking the participant to manage two unfamiliar laptops at once was overwhelming. We found that InDesign remembers where the panels are from last use and we had to learn to reset everything from where we had it arranged when we were last editing the tutorial on our laptop in InDesign.

Key Suggestions from Usability Tests and Peer Review

The major comments on our tutorial related to: fuzzy images, image sizes, arrows covering text, too much white space, inconsistent use of terminology, sentences that were too long or too short, and color for the comments. We addressed these issues gradually with major edits after the usability tests and then again after the peer review.

We learned from Usability Test #3 that it was confusing if we let the text span across the page from left to right with the image below the text. We went through the tutorial after the usability test and created two columns in most areas, so that the text would be on the left and the image on the right. This technique made the flow from text to image much easier to follow and eliminated large blocks of white space.

Challenges

All three of us use Windows PCs and laptops exclusively, so we had to prepare our tutorial for Windows PC users. We could not incorporate alternate instructions for Mac users. We tried to make this limitation clear in our tutorial.

The major challenge was that we had to pass the InDesign document back and forth between us and that caused the links to the images to break. After the initial draft, Rebekah realized that the question marks and link errors don't show in the pdf version that is exported from InDesign, so we stopped worrying about the original location of the images. We still had to pass the InDesign document back and forth and the only way it worked was to email it as an attachment to the next person with a new file name. We had to carefully plan who would work on it when. We learned that the easiest way to organize the work in the middle of the project was for the individual to edit their pages and send their revised InDesign file. Anne would move the revised pages into the master InDesign file while deleting the previous versions of the pages. This approach was acceptable until we had to edit the text for consistent writing style, develop standard naming conventions for InDesign menus and terms, and check the entire document for inconsistencies. Anne performed this task after the post-usability test corrections and again after the peer review.

Another challenge Anne ran into during the editing of her task on applying a Master page is that Adobe suddenly changed the term "Master" to "Parent: between the usability tests and the peer review. She had to replace the screenshots and edit the text of the tutorial accordingly.

Another challenge was that Anne preferred to use a graphic to label the steps while Dorothy and Rebekah preferred to use arabic numbers next to the text instead. We agreed to allow that discrepancy to stand as only the peer reviewer commented on it.

Goal Accomplishment

We took the assignments for this project seriously. Each of us learned many new skills in InDesign. We also learned how to plan, write scripts for, conduct, interpret, and incorporate suggestions into tutorials as a result of usability tests. We also expanded our writing and editing skills for user documents.

Teamwork

The team worked cohesively together throughout the project. We worked diligently during each class session often starting at 5:15 p.m. and staying past 9 p.m. We worked individually on the weekends and the week nights before the next class meeting to complete as many of the tasks that would be due on a given class night as possible, so we could maximize the time together for group work. We were not able to meet synchronously between classes because of work and class schedules. It was a highly productive group. We are extremely satisfied with the resulting tutorial. Our strong work ethic and excellent baseline skills enabled us to build our expertise and produce a quality product.

Professor Wickliff's Comments and the corrections we made

1. Include the version of InDesign the tutorial is designed with/for (17.2) on the title page – Done.
2. Turn off hyphenation – I knew about this problem from last semester, but hyphenation still kept reappearing despite my having turned it off at both the document and paragraph styles levels. I checked through the entire document again to ensure it was turned off.
3. Outline typographic conventions. I added the following section to the Introduction after standardizing the terminology used by the three of us throughout the document:
Typographic Conventions:
Bold Panel, menu, and screen selections; e.g., **Character**.
“Quotation Marks” Selection on your computer not in InDesign; e.g., “Desktop,”
“File Name:”.
4. Don't give novice users of your tutorial options. We had two instances of this in the document: the size of the textbox and naming a paragraph style. We changed the document to be prescriptive in both cases.
5. Define key terms – Done.

6. Provide an overview or purpose statement for each section of the tutorial – Done.
Key point.
7. Change centered red text summaries at the end of each section to left-justified black text on a light-colored rectangular background – Done.
8. Choose a consistent layout – single or two column layout. We opted for a single column layout and tried to standardize it as much as possible.
9. Size and crop graphics. We tried to do this in the revisions.
10. Replace poorer quality graphics. We tried to do this, but the screenshots that Rebekah took and that Dorothy edited in Photoshop still were not improved and we do not know why. This problem was the most frustrating of the project. Dorothy and I felt that Rebekah needed to capture the screenshots as she only had two pages of the entire tutorial she was responsible for. Dorothy and I could not follow what she had done, so we couldn't reproduce it and did not feel we should have to re-do her section. We did the best we could.
11. Use visually distinct styles for the different types of text and features. Done.
12. Incorporate more icons from the screen captures into the text instructions. Done.
13. Take out the reference to Google. Done.