UNIVERSITY OF NORTH CAROLINA CHARLOTTE

TO: Dr. Gregory Wickliff
FROM: Anne Moore, Rebekah Crosson, Dorothy Knosby
SUBJECT: ENGL4181/5181 Spring 2022 Project 1 Planning Memo
DATE: January 26, 2022

Our team of three is Group 1 for Project 1 in ENGL 4181 / 5181 this semester. We will create a step-by-step tutorial to teach novice users to perform several basic activities in Adobe™ InDesign® 2021. We will provide instructions on how to: 1) create text boxes and fill them with placeholder text (supplied InDesign); 2) create a heading style in a specific typographic style; 3) apply the new style to headings in the document; 4) create a paragraph style; 5) apply the paragraph style to the text in a text box; and 6) use the master page function to apply page numbers and a running header to the document. The tutorial will also explain how to set up, name, and save the InDesign document.

Audience

We will create the step-by-step tutorial for novice InDesign® 2021 users who are technical and professional writing students at UNC Charlotte. These students may have a range of experience with Adobe Creative Suite applications. A novice will be just as comfortable using the tutorial as something who is more experienced with the software. The tutorial will be written for the Windows 10 operating system because all three of the team members are PC users. We recognize that this decision will limit its usability.

Purpose

Our step-by-step tutorial will be used by students in future technical and professional courses to help them get started with basic tasks in InDesign, which is the software that is used in technical and professional writing courses to create user documents and for digital publishing. Our tutorial will be saved in pdf format and accessed and downloaded from a Canvas module along with several tutorials on other basic functions of the application.

Usability Tests

We plan to conduct four (4) usability tests: two rounds with two participants in each round. In each test, the two participants will work through the steps in the draft tutorial for a maximum of twenty minutes. The first round of testing will be performed with the first draft of the tutorial. After the first round of testing, we will revise the instructions that were confusing or caused failures for the participants to create the second draft. The second draft will be tested in the second round of testing to uncover additional failures and challenges with the tutorial. After the tests are complete, we will incorporate the rest of the input to create the final draft to be submitted with the assessment memo.

The usability tests will be conducted using Zoom for audio and video recording because UNC Charlotte subscribes to it and the files can be stored in Canvas in My Media and easily reviewed and edited. We will take notes as well while the participants are going through the instructions, in order to see which steps they successfully complete and which ones they have difficulty with or cannot complete.

The tasks to be performed in each usability test include:
1. We will read the introduction from our written script to each usability test participant. The introduction includes our expectations for what they will do during the test and our role.
2. Following the instructions, the participant will open Adobe™ InDesign® 2021 and create a new letter-sized document.
3. Task 1: The participants will create a text box and fill it with placeholder text.
4. Task 2: The participants will create a heading style in a specific typographic style.
5. Task 3: The participants will apply the new style to headings in the document.
6. Task 4: The participants will create a paragraph style.
7. Task 5: The participants will apply the paragraph style to the text in a text box.
8. Task 6: The participants will use the master page function to apply page numbers and a running header to the document.
9. Finally, the participants will name their completed file and save it in Adobe™ InDesign® 2021.

Project Schedule
- January 19: Conducted our first micro usability test with the tasks performed by the member of our team with zero experience using the software. It allowed the group to see the initial reactions of a novice using Adobe™ InDesign® software and to understand the tasks we would need to cover in the tutorial.
- January 26: Decided on the parameters of our usability testing and submitted our planning memo.
- February 2: Work on the draft tutorial. From January 26 through February 9, we will create and edit the draft of the tutorial. Anne will set up the Adobe™

InDesign® 2021 master document and add text boxes (Steps 1 and 6); Dorothy will create a heading style and apply it to a heading (Steps 2 and 3); and Rebekah will create a paragraph style and apply it to a paragraph (Steps 4 and 5). We need to learn to perform the steps in InDesign® 2021, create the InDesign® 2021 document, and take, edit, and place screen captures.

- February 9:   Conduct the first round of usability testing with two students. Prior to the second round of testing, we will make revisions to the tutorial based on what we learned before the second group of tests on February 16.
- February 16: Conduct second round of usability testing with two students. Observe as before and record/take notes for further revision of the tutorial. Additional revisions will be incorporated into the draft in time for the peer review process.
- February 23: Present rough draft for peer review in class by other students. Make further revisions based on the feedback from the class.
- March 2:   Submit final tutorial and assessment memo.

Budget

We do not have a budget for this project, but will give our usability testers some packaged snacks given that we are still in COVID protocols. We will absorb the cost of printing the scripts and drafts.

Product/Output

The step-by-step tutorial saved as a pdf will be our final product. The product should be clearly and concisely written and screenshots and icons that are not pixelated. We expect a novice user to be able to easily navigate the steps and complete the tasks. We will also store edited versions of the Zoom recordings in the My Media area on Canvas for Dr. Wickliff to review and for inclusion in our final portfolios.

Tone/Voice

We will write the documents in the second person imperative voice, as is traditional in user documentation, such as "Press the RETURN key" and "Click on the ON button." We will also employ a more casual tone in the instructions to increase the usability for our novice audience.

Illustrations

We will create screen captures using the Windows-Shift-S keyboard combination and a free application and then edit and place them in the InDesign® 2021 document. We may create videos as well, but have not selected video capture and editing applications yet.

Our Goals

1. Learn how to use the basic functions of Adobe™ InDesign® 2021 since we will be using it during the course.
2. Practice creating step-by-step tutorials in InDesign.
3. Practice conducting usability tests with actual novice InDesign users (anthros), including how to interact with participants as they are conducted in technical and professional writing positions.
4. Practice creating scripts for usability tests, interpreting results, and incorporating them into tutorials.
5. Practice editing and creating an aesthetically pleasing layout with some of the basic features in InDesign.
6. Practice our writing and editing for user documentation skills as well as recording, video, and image manipulation skills.