

Using User Guides, a usability review

Visual Quickstart Guide for QuarkXPress 5, *by Elaine Weinmann and Peter Lourekas*

A user guide user

Last spring I bought 3 user guides online, sight unseen. The guides were for programs I do not have on my computer, which I anticipated I could be using in the future. I have some familiarity with two of the programs, DreamWeaver and PageMaker; of the third, QuarkXPress, I knew only that it is a very powerful tool for creative Desktop Publishing. My criteria for purchasing the three manuals were that they should be relatively inexpensive and have good reviews. The book for QuarkXPress was the only one available for Quark 5, which has just been released. In fact the manual was so new that it was unavailable at the time, arriving several days after the expected date.

For DreamWeaver and PageMaker, I could be considered an intermediate user. I needed the manuals to refresh my memory and get me up-to-date in the newest versions. For QuarkXPress, I am a beginner. I want the book to give me a quick impression of the capabilities of the program, and to teach me the basics, so I won't look really stupid if I suddenly need to be using it.

For all three guides, I would be reading them without access to the program itself. Thus I need good screen captures to illustrate what is happening, since I can't see it myself. As chance would have it, my husband gave me Quark as a birthday present. (I think he was fascinated by the name – he's been reading about quarks!) Now I can actually use the book with the program.

Am I a typical beginner? I have a number of years experience with a slew of computer programs, including FrameMaker, MS Publisher and a little PageMaker. I assume that many Quark beginners have a similar background, but an author must not ignore those who come directly from WORD, with no DTP experience at all.

First impressions

The cover

The VISUAL QUICKSTART GUIDE FOR QUARKXPRESS 5 is a *big* book – 500 pages! I know the program is powerful, and therefore probably complicated, so that doesn't really throw me off. I had already figured that I would not become an expert immediately. The cover is very comforting: *"Teach yourself QuarkXPress the quick and easy way! This ... Guide uses pictures rather than lengthy explanations. You'll be up and running in no time!"* Just what I need. On the back I can read that the book covers beginning and intermediate level for people who *"need to learn QuarkXPress fast"*, but there is a line that causes me to wonder if this can be true: ***Works like a reference book – you look up what you need and then get straight to work.***

Can beginners learn from a reference book? Beginners usually need some sort of tutorial to give them confidence. They need a "quickstart" for opening and saving files, getting some text, pictures and tables on the page, and formatting what they've done. With a DTP program, they also have to learn the rudiments of text flow. Then they can use a reference book.

Skimming the pages

The **TOC** is extensive, 18 pages long. I notice that the beginning chapters, which I assume I'll be needing, are long. **The Basics, Startup and Get Around** fill 50 pages. **Text Input**, the whole reason for using DTP, starts on page 51! I will have to wade through many pages before learning how to add text to my document.

The **index**, at 28 pages, is the recommended length (1 index page to 20 text pages). I was also able to find what I was looking for in a couple of attempts. There are 2 **appendices** that look useful: Dingbat special characters and 12 pages of Keyboard Shortcuts, gathered into about 50 topics. On closer examination, however, there does not seem to be any rhyme or reason to the organization of the shortcut topics. It will be a big job to wade through all 12 pages looking for a shortcut I need.

Page layout

The pages have the usual layout for VISUAL QUICKSTART GUIDES: 2 columns, with text in the outer columns and screen captures near the binding. Screen captures are a good thing if you are reading the manual without the program, but now that I have the program, I can see that the page is extremely cluttered with before and after views. Since this is a word-processing program, many of the screen captures contain text, which is even more confusing. It is often difficult to see which capture goes with which section, even though each caption is clearly numbered and referred to in the text by the number (which start over on each page).

Nevertheless, I like the idea of 2 columns, which means short lines of text, and a more compact page. The technique works well in other Visual Quickstart Guides, and it inspired me to use a similar page layout when I write user guides.

Getting started

Being a beginner, I started with **The Basics**, and found to my dismay that after a good short introduction to the program, including a survey of the screen and the objects toolbar, the next 17 pages are an extensive catalog of menus and palettes, which I quickly paged through. The authors have made it easy for the intermediate users to find what's new, as new or revised sections are bolded in the TOC and flagged in the text. I wonder if an experienced user would be interested in using a tightly-packed manual.


The 16 pages of **Startup** not only told me how to install, create, save and open files, but described every little detail in the dialog boxes, every alternative I might want to chose, and a long list of what might be wrong on opening an existing file. These guys are thorough, but I don't need advanced details or troubleshooting information right now.

Chapter 3, **Get Around**, is short, but useless. I was supposed learn how to move through documents, but since I hadn't yet created a document to move through, I skipped it. This information would be more appropriately located where needed in later chapters.

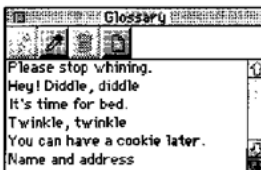
Finally I got to place some text in my document in a chapter called **Text Input**. At the end of the paragraph that tells how to drag the text box tool to create a variety of text boxes, I read:

Text Input

Repeating yourself?

You can store and retrieve frequently used words or phrases using the **Glossary**,  which is part of the **Xdream XTension** from Vision's Edge.

Need to alphabetize a series of words or phrases? Use the **Sort Paragraphs** command in the same **Xdream XTension**.



1 The **Xdream Glossary palette**

TIP. Well shone, moon—Truly, the moon shines with a good grace.

Dem. Well roared, lion.

The. Well run, Thisbe.

The. Well moused, lion.

2 To move text, highlight it, then choose **Edit > Cut**.

Dem. Well roared, lion.

The. Well run, Thisbe.

The. Well moused, lion.

3 Click to create a new insertion point.

Dem. Well roared, lion.

The. Well run, Thisbe.

TIP. Well shone, moon—Truly, the moon shines with a good grace.

The. Well moused, lion. *William Shakespeare*

4 Choose **Edit > Paste**.

To delete any item:

Choose the **Item** or **Content** tool, click the item you want to delete, then choose **Item > Delete** (**Cmd-K/Ctrl-K**).

or

Choose the **Item** tool, and click the item you want to delete. Then in the **Mac OS**, press **Delete** or choose **Edit > Clear**. In **Windows**, press **Delete** or **Backspace** or choose **Edit > Delete**.

The **Clipboard** is a holding area that stores one cut or copied selection at a time. The current contents of the **Clipboard** can be retrieved an unlimited number of times via the **Paste** command. The current **Clipboard** contents will be replaced if you **Copy** or **Cut** in any application and will be deleted if you turn off your computer.

To rearrange text using the Clipboard:

- 1.** Choose the **Content** tool.
- 2.** Highlight the text you want to move **2**.
- 3.** Choose **Edit > Cut** (**Cmd-X/Ctrl-X**) to place the highlighted text on the **Clipboard** and remove it from its current location.

or

Choose **Edit > Copy** (**Cmd-C/ Ctrl-C**) to place a copy of the highlighted text on the **Clipboard** and leave the highlighted text in its current location.

- 4.** Click in a text box to create a new insertion point **3**.
- 5.** Choose **Edit > Paste** (**Cmd-V/Ctrl-V**) **4**. **Smart Space** takes care of adding spaces where needed (see page 176).

TIP The **Clipboard** can also be used to cut or copy a text box, picture box, line, or group when the **Item** tool is selected, or a picture if the **Content** tool is chosen. Paste using the same tool that was used to **Cut** or **Copy**—unless you want the item to be anchored (see page 181).

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Delete Any Item; Rearrange Text

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“When the Content tool is chosen and a text box is selected, a blinking text insertion marker appears in the box and the pointer turns into an I-beam.”

Duh... I've forgotten what the Content tool is. There is no picture to help me out. I have to page back to chapter 1 to find it. Furthermore, this was not phrased as an instruction (“Select the text box and click on the Content Tool”) but as a comment, in the passive voice.

It turns out this refers to a really great innovation in Quark that I could use in other programs. Quark provides tools to select either an object or its content, instead of forcing you to click like a madman to choose the text you want to edit. Having learned this, I had a wonderful time playing around, writing silly things along crooked lines, copying in some long text to lead from one crazy text box to the next (which is actually the topic of the next chapter.), rotating boxes, adding colorful frames and changing fonts.

I soon suffered from information overload. Every section explains every imaginable way to do things: from a menu *or* a tool bar *or* a keyboard shortcut. There are numerous **tips** (in exactly the same format as numbered instructions), **captions** for screen captures, which repeat the text, and **suggestions** – often for so-called XTensions – placed among the screen captures. Often there are serious, useful tips on DTP mixed in with the basics of creating text boxes. Some of the plethora of screen captures even illustrate skills that are old hat to anyone who has worked with word processing (the illustration is a typical page.)

Evaluation

The VISUAL QUICKSTART GUIDE FOR QUARKXPRESS 5 is overwhelming for beginners and boring for intermediates. It contains much useful information, but it is organized so poorly that neither group can find what it needs. The format with text on the sides and illustrations in the center would work well if the center section weren't so cluttered. The promise on the cover that I'll “*be up and running in no time*” is false advertising!

Recommendations

- ✓ Remove the entire survey of menus and palettes from **Chapter 1: The Basics** and all of **Chapter 3: Get Around**, presenting the information where called for in the text. The menu survey could be included as an appendix.
- ✓ Shorten **Chapter 2: Startup**, introducing advanced information in later chapters, and placing troubleshooting in a sidebar box.
- ✓ Create a **tutorial** section for beginning users that presents the most essential things, saving all the advanced material for later chapters.
- ✓ Show inline pictures of **tools** where used.
- ✓ Present only **one way** to do things, using tools or simple keyboard shortcuts. Leave the rest to the user to figure out on her own.

Creating Quick Start Guides

A Quick Start Guide gives **typical users** the necessary information needed to produce **typical products**, or do **typical tasks** with the software or device. It is **not** an all-encompassing description of the software or product.

In order to write a Quick Start Guide you must find out who are the **users** of the guide. In the case of QuarkXPress, two groups of users – upgraders and beginners – must be satisfied **separately**.

- ✓ **Upgraders** need to know about new features, period. They already know the software through and through, and just need to know about the new features and how to use them.
- ✓ **Beginners** want to be able to create a document as fast as possible. Typical users of Quick Start Guides have a job that has to be done NOW in a new program. They don't have time to learn all the necessities. Quark beginners can be assumed to be skilled users of a word processing software and may even have tried their hand at layout software like Publisher or PageMaker. Give them **task based step-by-step** lessons in the basics only:

- Using tool bars to create and manipulate text boxes.
- Writing and importing text, and linking text boxes.
- Using tools to format text, use color, and create styles..
- Adding graphics
- A short introduction to Bézier objects, which is something Quark beginners probably have not worked with before.
- Creating hyperlinks.

The Quick Start Guides for Beginners and Upgraders could well be the first 2 chapters of a comprehensive guide that documents the product in detail. Such a book could include useful sections with “Tips and Tricks”, short cuts, and information about X-Tensions (Add-ins).

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- ✓ Assume that even the beginning user has some knowledge of word processing, so that obvious techniques (like cutting and pasting) don't clutter.
 - ✓ Place notes and tips in separate sidebars and boxes, clearly distinct from text and screen captures.
 - ✓ Clean up the shortcut section so that it is organized logically.

Postscript

I discovered that the on-line tutorials on the Quark homepage are just as wordy as this manual. Lesson One, in which we learn how to open a file, was over 70 pages of pdf!

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Upland, January 19, 2003