

Patrick Hofmann | Workshop: **Intuitive images: creating and evaluating usable graphics for international audiences**

Part 1: Visual literacy for technical communicators: Thinking and expressing more graphically

In our technical documentation, online help, and interface designs, our pictures always seem to play second fiddle to our words. We find them too hard to illustrate, we encounter too many resolution and incompatibility issues, and we can never seem to make them attractive enough and meaningful enough.

In this workshop, Patrick Hofmann will get very graphic :-)) with these challenges. He will lead a fun-filled session, sharing common problems, evaluating your existing documentation challenges, visualizing different types of information, and working on hands-on exercises.

Key Learning Objectives

- How to visualize as you write—with navigational cues, conceptual diagrams, technical illustrations, flowcharts, or screenshots
- How to make your visuals consistent and professional—applying simple “templating” techniques and attributes to all your visuals
- How to repurpose and “transport” your visuals to other media and formats and overcome resolution and incompatibility problems.
- How to improve the visual appeal and usability of the information that you produce.
- How to use a toolkit of tips and tricks to become visually and graphically savvy.

Key Topics

1. **The problem with graphics:**
Let's address specific types of problems with the visuals, pictures, images, and graphics files that we put in our information. Let's identify what problems are common, what has led to them, and how can we solve them.
2. **Templating your graphics:**
Just like building style sheets and standards for our textual information in our documents, we should build standard sizes and standard attributes for our graphics. Whether our graphics include screenshots, flowcharts, maps, illustrations, or conceptual diagrams, we can create templates that standardize and professionalize our images to make them consistent throughout our documents.
3. **Showing what you mean:**
Even with the most effectively applied graphics templates, our graphics are not effective if we don't convey the real message of the picture. What is the graphic trying to say? How can we visualize it to better address the needs of our audience? What strategies can we use to best apply “a focus of attention” in our graphic? Just like the words in our technical documentation and information, we must craft ways of amplifying the meaning in our graphics while keeping the message brief and succinct.
4. **Improving screenshots, charts, and flow diagrams:**
How can we take the above principles and apply them to our screenshots and to our

flowcharts? Often considered the most frequently used visuals in our documents, what strategies can we use to improve the scan-ability and read-ability of these images, and make them as easy to understand as possible?

5. **Enhancing the usability of graphics:**

In certain situations, some visual types are much more usable than others. For example, when is line art more appropriate than digital photography? Or vice versa? Is a separate key legend more usable than a diagram annotated with lines and callouts? Should I invest in transforming my visual into an animation or video? Following years of usability research among various case studies, we will uncover the answers.

6. **Handling file formats and new technologies:**

What file types work best for my hard-copy docs? Can I recycle them for my online Help or website? What will happen to the resolution? There are countless questions and scenarios in our file management and multimedia process, and this section aims to get to the bottom of them.

7. **Applying graphic principles to your docs:**

Taking the principles and critiques learned in the previous section, we will spend some time working on a series of document visualization and improvement exercises, based on samples and drafts provided by the audience.

Part 2: Visualizing your information: Advanced techniques to make your documents more graphical and usable

Having studied information products from worldwide companies over the past 13 years, I'm very impressed with the growing number and richer nature of graphics that appear. Now, to bring that information up to the next level, the graphics need to incorporate the same level of usability analysis, style-guide templating, and organizational thought as the 'worded' infrastructure. How do we achieve this? By addressing these advanced how-to activities, attendees will walk away with key information improvement techniques to apply to their own work:

1. **Using alignment to enhance readability:**

Even in well-detailed network maps, flow diagrams, and animated flows, we can dramatically enhance their readability by using various alignment techniques to arrange the elements into a cleaner, clearer format—this will help guide the eye through the image more swiftly.

2. **Reducing visual traffic:**

In graphic visualizing of physical systems and interfaces, the amount of detail can be reduced dramatically. By removing irrelevant details, we can amplify the real purpose of the graphic, improve the placement of annotations, and maximize usability. Here we will conduct some simple verbalization and evaluation exercises to judge what elements are necessary and what elements can be removed.

3. **Improving the typography of your graphics:**

Just as the body of your documents have various typographical styles to distinguish one type of information from another, your graphics must do the same. Component labels, flow-line labels, and primary and secondary captions, to name a few, should each have consistently applied and distinguishing characteristics to make image scanning much more effective.

4. **Distinguishing line weights and values:**

Much like the typographical attributes mentioned previously, your graphics' line weights should have specific attributes for specific roles. Primary objects or messages should stand out with heavier line weights; directional flow lines need a contrasting line weight; annotation lines need to be distinct from the others, and so on. By applying these rules consistently throughout your visuals, you will dramatically enhance the readability and usability of them all. Here, we will try to address several graphic types: flow diagrams, annotated screenshots, line art images, and multimedia animations.

5. **Improving the use of legend labels:**

Although many graphics may effectively use high-contrast, alphabetically or numerically labeled legends and hotspots, there are proven ways to integrate the legend labels into the image itself, thus reducing the amount of back-and-forth eye movement that legends require. Here, we will cite some of my past usability research to judge the effectiveness of in-graphic captions over legend labels.

6. **Simplifying eye-wandering in your images:**

Especially in multimedia animations and flow diagrams, there are many examples of complex reading patterns and multi-directional flows that can be simplified or 'straightened out' with a few minor tweaks of positioning and placement.

7. **Cleaning up annotations:**

This area is perhaps the most challenging, as there are so many scenarios and samples of image annotations, callouts, and external labeling to cover. However, by studying several examples, we can establish some simple ground-rules or guidelines for cleaning up the superimposed annotations on images.

8. **Cropping and labeling more effectively:**

Although images like screen captures can always add some visual flair to an information product, they each should be evaluated for what their key message or instruction is, and that message needs to be amplified in the image. Here, I aim to cover a number of screen thumbnailing, cropping, editing, and labeling techniques that will make your screen-based images simpler for you to implement and simpler for your readers to digest.