

## Webifying Large Documents Without Going Insane.

### Summary

Many of us in the web world have had the experience of being given the task of taking a long document and preparing it for use on the web. Whether it's a piece that is designed to just be read (brochure-ware), or a process (such as a survey or test), we need to find a way to work with designers and developers to create a web experience that is great for the users of the material.

This article provides a high-level guide to getting there.

Basically, there are 6 steps:

1. Discover the author's intent
2. Determine the document type
3. Consider the environment in which the document will be presented
4. Provide structure to unstructured material
5. Provide guideposts for the reader
6. Determine the process to get through the material

Following these steps will enable you to take any material and turn them into web experiences that engage readers/users, and leave them wanting to come back for more.

### Introduction

We have all had the experience of landing on a web page to only find an unstructured, long, complex document or process. Let's face it; it's an awful experience. Without any structure or guidance, long materials, especially on the web, tend to be daunting and have users hit the "back" button rather than anything else. **If you want to get your message across, or have users interact with your site, you need to find a way to make the experience positive...even fun.** This doesn't have to be an exercise in insanity, but it does require following some basic processes.

In a perfect world, the writer is web-savvy and has provided materials that are written to be web-ready, but unfortunately this is rarely the case.

When you've been given the task of webifying long materials, there are two main groups you need to consider: the first, and most important, are your users, and the second are the designers and programmers who will actually create the web page(s). Getting the right



information to the second group will make it much easier to create happy users who love coming to your website and will come back for more.

With the processes outlined here your designers and/or programmers can work with long and complex content, and create great user experiences, no matter the length of the material. And, even better, your authors can keep these in mind while writing and produce content of any length that is easily webified.

## Step 1: Discover the Author's Intent

If the author is available, it is invaluable to talk to him or her and **find out what the original intent was for this document or process**. Having that background information will enable to understand what elements are most important, what are secondary and tertiary, and give you a solid understanding of what the whole piece is for. This enables you to make decisions during the production process that support the material.

## Step 2: Determine the Document Type and Process Flow

Whether brochure-ware or a process, **your users will greatly appreciate being kept in mind during the production process—it shows that you care about them**.

Doing this requires **understanding the process** they must go through to finish the material. Depending on the document type, you'll need to provide different types of help along the way so users can easily get through the material rather than giving up frustrated half way through.

Determining the document type will let you know the first steps to take. For brochure-ware, it's generally enough to break the document down into its component parts. For process, you may need to provide extra guidance for your audience, such as letting them know the next steps and/or where they are in the process.

For any kind of material, the **first step is to break the material down** into the smallest chunks that make sense. Unless forced to, users refuse to read long passages on the web, so break the material down into easily digestible chunks. This makes for a much better experience and enables readers or users to find what they want quickly and scan over the rest, giving you the best likelihood that your material will be read.

For processes, break them down into small sections that have a consistent theme. For instance, on a survey the first section might be collecting their demographics, the second asking the initial questions, and so on.

For brochure-ware, break it down into sections that make sense for the material. For instance, for a product brochure, you may have an overview, a section of technology, an application section, and a conclusion.

In either case, take a look at the material from a high level and start to consider the pieces into which the material can be broken down, and ensure that there is a flow that makes sense from start to finish.

### Step 3: Consider the Best Environment

One critical area that is often not considered is the environment in which the material is presented. It's critical because **the environment provides context for users**, which will let them know if they have entered a special area, or if this is "just" another part of your site. Therefore you need to consider the page design in which this process will take place. Presuming that the material is to live in an existing website, does it occur in a "normal" secondary page, or is there a reason for these pages to have a special look that is unique from the rest of the site?

For material that is more "brochure-ware," it's better to have it appear in pages that look like the rest of your site.

For material that is special in some way—a unique whitepaper or survey or other content—then it's best to have them in pages that are distinct from the rest of your site. These pages should have a unique "flavor" to them, while still maintaining consistency with the branding of your site. In other words, don't have these pages be so different that users think they have gone to a totally different site!

### Step 4: Providing Structure

Structure provides safety; **a well-structured piece can be any length and still allow readers/users to enjoy getting through it**. This can be highly challenging work, especially if the source document hasn't been written with the web in mind.

From the work in step 2 you will have started thinking about how to break your material down into easily digestible chunks. Here is where you need to complete that work.

The best way to provide structure, whether for brochure-ware or for a process, is to create an outline; this is especially true you're working with pre-existing material that wasn't created with one.

Creating an outline can be difficult, but it forces you to think about how everything fits together. Only in outline form you can see all of the pieces at once, in order to ensure that they all fit together flow in a way that makes sense to a user or reader. It's also the best way to explain the material's structure to your designers and programmers, so that they can create great user experiences.

A good outline breaks up the material into both major and minor sections. The minor sections should go down to the smallest sections with a single theme. In a brochure-ware piece these theme will be pretty clear, although you may need to move some content around to keep each theme consistent (it's not unusual for non-web-savvy writers to be somewhat rambling, and it's going to be your job to undo that).

If you're working with an extremely complex process, it you may need to create sketches, diagrams, or process flows so designers and programmers can follow the flow of the process. Keeping this as straightforward as possible will save considerable time later in the project.

Finishing this enables you to move to the next step, providing guideposts.

## Step 5: Using the Structure to Provide Guideposts

In order to get through complex materials, **users need to be able to understand where they are, what's to come, and how much more they have to do to finish.** Providing this to users—whether in brochure-ware or in web processes—is critical to creating good user experiences.

When you outlined the material in step 4 you probably gave each section a title (if not, do it now!). These titles give you subheads that provide a map of the entire scope of the material. Thus, the subheads become the guideposts for your users. This is why creating this structure was so critical, because it becomes underlying information that allows you to guide end-users through the material easily and without distress, impatience, or frustration.

These guideposts should be made obvious to your users/readers as they work through the material. For instance, for a brochure-ware piece you might provide side navigation with each of the subtitles, and highlight the one in which the user is

currently reading. This would also allow users to jump directly to the section that is most interesting to them.

In a process, you can provide very similar information, but generally a process implies that you want users to progress through it in a linear fashion. In this case show the map of the process, but don't allow users to use that as navigation, since you don't want them jumping around.

There is no single design guide rulebook for this, but collaboration with your designers and programmers enables you to design a method that is well suited to your materials, users, and programming capability.

## Step 6: Determine and Implement the Process Flow

You've now decided on the context for the material, broken it down to smaller chunks, created guideposts, and decided if your users can jump around or need to proceed linearly through the material. From here it is important to describe **how a user gets from one section to the next**. Some questions that you might ask yourself are:

- Does the content proceed in a linear flow automatically?
- Is some user intervention required in order to move from step to step?
  - o If some user intervention is required, then what kind; buttons, sliders, arrows, or something else?
- As noted above, are users allowed to jump around in the material?

If you don't have answers to these questions, then work collaboratively with your designers, programmers, and (if possible) authors to figure it out. All of these types of questions need to be answered in order for the material to be easily (and quickly) designed and programmed. The original intention of the piece and the content map will give clues as to how the material is best presented.

Once you have all of these questions answered, you are ready to hand the material off to your design and/or programming team. This information will provide them with the framework and structure they need to produce great experience for your users.

Finally, even if you have already consulted with the author, have them available to advise your design and programming teams during production. Understanding the author's intent directly from the author is invaluable to these teams and will result in a better

outcome; an easier design and production process (and, thus, less craziness for you) and a better experience for you users.

## Conclusion

By taking these steps you will go a long way to minimizing the time and trouble that it takes to get these kinds of documents/processes on the web, and end up offering a much better web experience.

Presuming that the writer isn't web-savvy, the best and fastest way for the entire process to proceed is to have the design team involved in the authoring process as early as possible. This way they can guide the writer so that he or she produces copy that is more easily "webified," and you'll provide your users with a great experience.

Where this isn't possible, these steps will guide you through making this challenging task as easy as possible.