Agenda

1. Logix Designer and the 9,000 help topics
2. Let’s ask the SMEs
3. Add that metadata
4. We learned a few things
Studio 5000 Logix Designer needed an update

What’s Logix Designer?

• Rockwell Automation’s sophisticated logic programming and management system
• If you need to automate machines and robots, you’re going to need Logix Designer
• A mature, feature-packed software application
• Described by around 30 manuals and by over 9,000 help topics
The help and manuals had to be updated, too

Project called Logix Designer Refresh
Switch from chm files

We're going to miss you, chm
Quick Start Steps

Quick starts illustrate how to use basic features of the Logix Designer application to get a system up and running.

Use these procedures to become familiar with Logix Designer:

- Creating a project
- Configuring the controller
- Creating and configuring I/O
- Entering tags and aliases
- Entering ladder logic
- Downloading
- Monitoring tags
- Monitoring ladder logic

Use these procedures to learn more about specific system applications:

- Configuring an Ethernet motion system
- Configuring a SERCOS analog motion system
- Using user-defined data types
- Creating add-on instructions

These Quick Starts provide overviews of how to perform common tasks; there are many more features that are not illustrated in these procedures. Refer to the online help for those specific features for more detailed information.

See also

- Navigating the application
- Tasks, programs, and routines
HTML search needed improvement

• Test searches sometimes produced few results or non-curated results.
• In a Logix usability test, users were encouraged to search for help topics when performing tasks, and sometimes came up empty.
Two-pronged approach

• Andrew made some fixes:
  • Search works for phrases
  • Search terms highlighted in results
• Logix Info devs needed to do some curating
  • Keywords!
Add metadata to topics

• When we know the likely search terms and the most helpful help topics, we can add the search terms to the help topics as keywords.
• We decided to ask Logix SMEs, such as commercial engineers, software testers, developers, and product owners, to help us predict likely search terms.
Meetings or surveys?

- Should we meet with the SMEs?
- Should we send them a survey?
Another discussion: should they look at the help?
10-step survey approach

1. Generate a feature task-support cluster
2. List potential search categories
3. Send a survey to the SMEs
4. Gather & export search-term ideas
5. Analyze, map terms to topics, test, and refine
Keywords in 10 easy steps

Help topic map or tree

1. Create a help topic map or tree based on tasks.
Keywords in 10 easy steps

Help topic map or tree

1. Create a help topic map or tree.
Keywords in 10 easy steps

Categories and a Survey

2. Create a list of categories for which users might search.

3. Create a survey that asks for search terms users might enter when searching the help for that category.
Keywords in 10 easy steps

Send the Survey to the SMEs

4. Create a list of SMEs who can help brainstorm search terms.

5. Send the survey to the SMEs.

Hello—

The Info Dev team is improving the search results in the Logix HTML help system for v32. We’re contacting you as subject-matter experts who can help us.

Our plan is to send short surveys to collect terms users might search for. We’ll insert the suggested terms into the help system to improve the search results. We will send out a survey for a specific category every two weeks until September 2, when we need to deliver the online help for the Logix v32 release. Each survey should take around ten minutes to complete.

This first five-question survey focuses on security. If possible, please complete the survey by Monday, July 9. Feel free to forward this email to members of your teams. We’d also welcome feedback on the survey.

Thanks again for your help!

https://www.surveymonkey.com/r/X5J6LF2
Keywords in 10 easy steps

Analyze the responses

6. Analyze the search term ideas in the survey responses.
   - Drop terms that are exact matches for topic titles.
   - Test the terms that sound useful.
   - Avoid terms that might highlight a concept at the expense of something else.
Keywords in 10 easy steps

Match the keywords to the topics

7. Compare the list of search terms to the topic map or tree & keywords.csv file.
8. Assign search terms as keywords to the topics.

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Keywords in 10 easy steps

9. Insert the keywords in the topics in AuthorIt.

10. Publish help, test the search results, and make adjustments.
What we learned

A few takeaways

- SMEs can eventually develop survey fatigue. Might be best to send out surveys in order of priority.
- Unless you’re an expert in all the product functionality, you need to tread lightly.
  - *Secondary* turned out to be a risky keyword.
- On some surveys, we were pleasantly surprised at the responses—some we’d never have thought of. On some surveys, we were not surprised, and found that our own ideas for search terms were quite close to what the SMEs came up with.
Questions?
Thank you