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Designing Online Help

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Designing Online Help

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Planning and designing a Help system for application software is an important task, which will normally involve some collaboration between the author, the business experts, and the programmers. The main design effort, though, normally rests with the author.

Researching the Help

The first thing the author needs to do is to get a thorough understanding of what the users need from the application and the tasks they will use it for. This involves identifying the locations in the application where the user may need Help. These locations are the aspects of the product that aren't immediately obvious to the user or can't easily be learnt by trying things out. In other words, the points where the user could get stuck.

For context sensitive Help, the programmer then assigns a “**unique identifier**” to these points, which usually correspond to a Window, a Dialog box or a screen, or sometimes to an individual field on a Dialog box. The identifier simply connects these locations to the relevant Help topic.

Writing the Help

The author's job involves writing all the Help topics and assigning the corresponding identifiers along the way. One of the main things he or she must bear in mind when writing Help is that a topic may be read in various different ways. For example, a topic that is typically seen as an entry point (displayed when the user clicks the “Help” button), may also be a part of the browsable topic hierarchy. Therefore, a topic needs to be written to work well in both contexts.

A side aspect of writing Help involves finding any design flaws in the product that may hinder usability. Because they get to know the product inside out during the writing process, authors are in a perfect position to highlight such flaws. In many respects, the author becomes an integral part of developing the product itself.

Now let's look at the structure of Help and at how to keep its many elements to a manageable size.

Help Display

Help can be displayed in a number of ways. Most commonly, it consists of a **toolbar**, **content pane**, and a **navigation pane**. In virtually all Help systems, the navigation pane contains a **table of contents**, a **hierarchical index**, and a **search engine**, which searches through the full text of the Help. The user can take advantage of any of these to find the assistance they need.



Table of Contents

The **table of contents** has a “tree” structure, which displays topics in an expandable/collapsible hierarchy. The user simply double clicks on a topic heading and it opens to reveal its contents — a series of sub-topics. Double clicking again closes the topic heading and hides the sub-topics. Because the table of contents is expandable and collapsible, it is often referred to as a “dynamic” table of contents — differentiating it from the static table of contents found in a printed book.

The table of contents is the “front door” to a Help system. It gives users an overview of the Help system and an idea of the scope of the information provided. Therefore, the table of contents needs to be organised logically, with clear and descriptive topic and sub-topic headings. That way, users who are looking for Help on a particular subject can easily find it by expanding topics and selecting the appropriate sub-topic.

Index

As well as the table of contents, the **index** is used to find information within a Help system. In fact, studies suggest that users rely on the index more often than the table of contents, particularly when they know what they are looking for. Users who open a Help system with a specific question in mind are likely to try and find the answer by typing a keyword into the index and scanning the results.

If an index is properly designed, it will contain well-chosen keywords logically associated with relevant topics and will easily guide users to the information they are looking for. The best way to select keywords is to put yourself firmly in the user’s shoes. Imagine them approaching a particular point in the application software with a specific activity in mind - the objective they are trying to achieve. The author’s job is to try to guess *all* the possible keywords they might use to describe what they are looking for. Not just “creating a record”, for example, but also “records; creating”, “adding a record”, “new records” or “how to enter new data”.

Search

The **full text search** feature is another important tool. In contrast to the index, the full text search database catalogues every word in the Help system - not just the index entries. The user keys in their search term, scans the results, and double clicks on the most relevant topics.

Dynamic Cross References

One of the main advantages of online Help over printed documentation is the ability to create dynamic cross references - also called *associative links* - that make it easy for users to explore related concepts and information. Dynamic cross-references work just like the links on a website. They usually take the form of buttons (called “See Also” or



“Related Topics” buttons), which allow users to directly jump to topics that contain information related in some way to the topic they are viewing.

Using “See Also” and “Related Topic” links helps keep topics down to a manageable size. Breaking information down in this way is quite a skill. You have to be able to see how themes can be split up into segments that can readily be understood in their own right. And when you come to write up each information chunk, you have to stay firmly on track (when you find yourself going off at a tangent, you turn it into a related topic).

Browse Sequences

Browse sequences are a popular secondary navigation aid. They allow you to organise and present information in sequence, a technique that is very useful for tutorials and for breaking information up into small, easy-to-understand blocks. Instead of having to scroll through lengthy units of information, users can click forward and backward through pages, like on a website. Because this approach provides users with a definite path to follow, it encourages them to explore and learn unfamiliar features of a product.

Pop-Ups and Secondary Windows

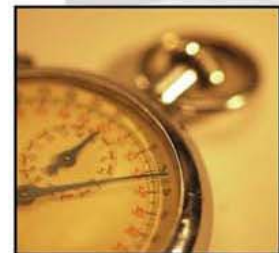
Pop-up windows allow you to display additional information - such as a glossary definition - in a small pop-up window that can be closed when you have finished reading it. **Secondary Windows** are typically used to display supplemental content that is meant to remain visible while the user explores the rest of the Help system. Both pop-up and secondary windows provide a means of presenting extra information to the user, without them losing the content of where they are within their search for information.

Fonts

When selecting a font for your Help system, you need to bear in mind that font sizes expand and contract according to the screen resolution. Due to this, many Help authors write for 640x480 (VGA) monitors. Microsoft tend to use an Arial 8 point font for their Help files. And the accepted practise is to use Arial, MS Serif, or MS Sans Serif. Fonts like Times New Roman work better for printed documents than for screen displays.

Subjective Aspects

The most important element of any Help system is to provide information to get the user back on track. But other issues are at stake too. Customer loyalty, for one. You might have the best designed Help system in the world, but if the tone of the text is dry and lifeless, you still run the risk of customers migrating to the competition when it comes to upgrade time.



Look at it this way, Help systems get used regularly - a few times a week or a good deal more in some cases. Therefore, besides offering assistance, your Help system acts as a company representative. This is why the look and feel of your Help needs to be appealing and welcoming. It is also beneficial to the user if the text has a “friendly voice”. Some of the best Help systems inject an element of humour and put across a kind of “communal spirit” - implicitly saying, “we’re in this together, let’s try and find a solution”.



This approach makes using Help a more pleasurable experience - which reflects on your company. Customers will then be more likely to upgrade their current application and/or buy more products from you.

Conclusion

One thing is certain: the winners in the IT world rank Help and user documentation with the same level of importance as the product. Admittedly, there wouldn’t be Help without a product, but it is also true to say that a product wouldn’t be complete without Help. There was a time when online Help was viewed as a “nice to have” feature. Now it is an expected component of all significant software. What’s more, users increasingly demand that every aspect of Help is clear and genuinely easy-to-follow - and is written in a tone that they can relate to. Meet these needs and you generate a powerful level of brand loyalty.

If you have any questions about designing online Help, you can email me at: feedback@plainwords.co.uk



Further Information

If you haven’t built a Help system before, but would like to, the Freelance Storyteller Website has a section that runs you through designing a simple Help system. It’s in plain English, is easy to follow, and will set you on the right road. Highly recommended. Go to...

Freelance StoryTeller: Help

http://www.freelancestoryteller.com/the_freelance_storyteller/help_index.htm



Help Tools

Doc-To-Help 2000 Website: www.wextech.com

RoboHelp Office (Version 9.x) Website: www.ehelp.com

ForeHelp 5 Website: www.ff.com

HDK (Hypertext Development Kit) Website: www.virtualmedia.com.au

Plain Words – The Big Picture

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