

Designing Successful Help for Web Applications

<h2>Designing Successful Help for Web Applications</h2> <p>A Comparison of Five Models for Context-sensitive Help</p>	 <p>www.winwriters.com 1-800-838-8999 (US and Canada) +1 206-285-2605</p>
<p>Matthew Ellison Conference Director, WinWriters matthew@winwriters.com</p>	

<h2>What we'll cover in this session</h2>	
<ul style="list-style-type: none">▪ Definitions of web applications and web-based user assistance▪ Examples of user assistance currently in use with web applications▪ The usability test that WinWriters conducted on its online registration system▪ What we learned about the way people use Help for Web applications	

<h2>What are web applications?</h2>	
<ul style="list-style-type: none">▪ Software programs that provide some value through interaction with the user<ul style="list-style-type: none">– Web applications will be indistinguishable in look and feel from traditional applications▪ Web app profile:<ul style="list-style-type: none">– Served to multiple users from a single source– Delivered to users via Internet/intranet protocols– Presented to users via a (customized) browser	

<h2>What is web user assistance?</h2>	
<ul style="list-style-type: none">▪ The support of web apps through:<ul style="list-style-type: none">– Domain information– Task-based procedures– UI information▪ Implementation is based on the same Web app profile	

<h2>Web applications</h2>	
<ul style="list-style-type: none">▪ What are the challenges for the user?<ul style="list-style-type: none">– Frequently, the user lacks knowledge of <i>the domain</i>, rather than of the procedure– How helpful is this topic? <p>To open a database</p> <ol style="list-style-type: none">1. On the File menu, click Open Database.2. Click the database that you want to open, and then click Open.	

<h2>Help designs on the Web</h2>	
<ul style="list-style-type: none">▪ Countless web applications are emerging▪ Several prominent commercial apps present us with models for different forms of user assistance<ul style="list-style-type: none">– eBay– Washington Mutual– MSN Money– Fidelity	

Designing Successful Help for Web Applications

Very busy and complex site for buying and selling

Lots of domain concepts required (bidding, escrow, reserve price auction)

Prominent Help option on Home page

Natural language query

Education for new users

eBay community

If you just want to browse... A good place to begin is our categories list. Or, you can click on the "Browse" button at the top of any page.

Remember: If you want to bid, you'll need to register first.

Link from Help text to actual task

Help and actual registration task are highly integrated

Links to other Help information

My question: What does "downloading transactions" mean?

I assumed I was in "Help"

So, I scrolled down to online banking...

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The usability test

- Focus on providing domain knowledge...
 - Do I have to be studying full-time to qualify for the Student discount?
 - What is the LaunchPad Certificate Program?
- ...rather than procedural Help:
 - How do I select a seminar?
 - How do I move to the next screen?
- Focus on context sensitive implementation of the Help

A four-page registration form

WinWriters Online Help Conference 2004 Annual

ONLINE Registration

Step 2 of 4 - Registrant Information

Please enter the contact information

Name (required)	Title
Organization	Email Address (required)
Address (required)	Employee Mail Stop and Department
ZIP/Postal Code	Country (if not U.S.A.)
Phone (required)	Fax
Group Contact Person (required for group registrations)	

Move to Step 3 Reset form

Five versions of the online registration process

- No Help information
- Side-by-side, field-level Help
- Page-level Help in a separate window
- Field-level Help in a separate window
- Help built into the user interface

No Help information

WinWriters Online Help Conference 2004 Annual

ONLINE Registration

Step 1 of 4 - Session Selection

General Sessions • Monday through Wednesday	
Single registrant	\$1,395
Returning attendee	\$1,195
Group of 2 to 5	\$1,325
Group of 6 or more	\$1,195
Student	\$695
None	
Sunday All-Day Seminar • 9:00 am - 4:00 pm	
Improving Help Design through User Site Visits • D25 Rob Houser, User First Services	\$295
None	
Sunday Morning Seminars • 9:00 am - 12:30 pm	
Working with Microsoft HTML Help 1.x "Under the Hood" • W13 Cheryl Lockett Zubak, Work Write	\$195
Creating WebHelp with RoboHelp HTML Version 10 • T44 Char James-Tanny, TIF Associates	\$195

Side-by-side, field-level Help

WinWriters Online Help Conference 2004 Annual

ONLINE Registration

Step 1 of 4 - Session Selection

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Single registrant (Help)	\$1,395
Returning Conference attendee (Help)	\$1,195
Group of 2 to 5 (Help)	\$1,325
Group of 6 or more (Help)	\$1,195
Student (Help)	\$695
None (Help)	
Sunday All-Day Seminar • 9:00 am - 4:00 pm	
Improving Help Design through User Site Visits • D25 Rob Houser, User First Services (Help)	\$295
None	
Sunday Morning Seminars • 9:00 am - 12:30 pm	
Working with Microsoft HTML Help 1.x "Under the Hood" • W13 Cheryl Lockett Zubak, Work Write (Help)	\$195
Creating WebHelp with RoboHelp HTML Version 10 • T44	\$195

Help

Overview of Step 1
In Step 1, you need to supply the following information:

- The applicable fee for the General Sessions (if you plan to attend them)
- The Sunday seminars that you require
- Whether you would like to enroll in the LaunchPad Certificate Program.

Note: You do not have to attend the General sessions in order to register for the Sunday seminars

The fee for General Sessions covers all Conference sessions from Monday February 11 through Wednesday, February 13. There is a separate fee for each of the Sunday seminars. As you make your selections, the fees are totaled at the bottom of the table.

Page-level Help in a separate window

WinWriters Online Help Conference 2004 Annual

Help on Step 1

Step 1

In Step 1, you need to supply the following information:

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A single long topic for each entire step of the process

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Field-level Help in a separate window

Select this option if you are a member of a group of two to five individuals registering at the same time. The fee is then reduced to \$1325 per person. No other discounts apply.

Click to close this window.

The fee for General Sessions covers all Conference sessions in order to register for the Sunday seminars.

The fee for General Sessions covers all Conference sessions from Monday February 11 through Wednesday, February 13. There is a separate fee for each of the Sunday seminars. As you make your selections, the fees are totaled at the bottom of the table.

General Sessions • Monday through Wednesday	
Single registrant	<input type="radio"/> \$1,395
Returning Conference attendee	<input type="radio"/> \$1,195
Group of 2 to 5	<input type="radio"/> \$1,325
Group of 6 or more	<input type="radio"/> \$1,195
Student	<input type="radio"/> \$695
None	<input type="radio"/>
Sunday All-Day Seminar • 9:00 am - 4:00 pm	
Improving Help Design through User Site Visits • D25 Rob Houser, User First Services	<input type="radio"/> \$295

Help built into the user interface

ONLINE
Registration

Step 1 of 4 - Session Selection

In Step 1, you need to supply the following information:

- The applicable fee for the General Sessions (if you plan to attend them)
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- Whether you would like to enroll in the LaunchPad Certificate Program

Note: You do not have to attend the General sessions in order to register for the Sunday seminars

The fee for General Sessions covers all Conference sessions from Monday February 11 through Wednesday, February 13. There is a separate fee for each of the Sunday seminars. As you make your selections, the fees are totaled at the bottom of the table.

General Sessions • Monday through Wednesday	
Single registrant	<input type="radio"/> \$1,395
Returning Conference attendee - Select this option if you attended the 2001 WinWriters Online Help Conference in Santa Clara. Your 2002 fee is then reduced to \$1,195. No other discounts apply. The discount is not transferable.	<input type="radio"/> \$1,195
Group of 2 to 5 - Select this option if you are a member of a group of two to five individuals registering at the same time. The fee is then reduced to \$1325 per person. No other discounts apply.	<input type="radio"/> \$1,325
Group of 6 or more - Select this option if you are a member of a group of at least six individuals registering at the same time. The fee is then reduced to \$1,195 per person. If you think there may be more than six, you can add the extras at a later time and we will honor the price of \$1195. However, you still need to enter the first six now with guarantee of payment. Please note that no other discounts can be combined.	<input type="radio"/> \$1,195
Student - Select this option if you are attending classes full time (12 credit hours or equivalent)	<input type="radio"/> \$695

Advance orientation

The Registration Process

Registering for the WinWriters Conference is a 4-step process. Each of the steps is as follows:

Step 1	<ul style="list-style-type: none"> Pricing level for General Sessions: <ul style="list-style-type: none"> Single registrant (no discount), or 2001 Conference attendee, or Member of group of 2-5 registrant Member of group of 6 or more registrant Student The Sunday seminars that you require Whether you would like to enroll in the LaunchPad Certificate Program
Step 2	Name and contact details of attendee
Step 3	How you want to pay for the Conference
Step 4	How you heard about the Conference

If you are registering a group of attendees, you need to register each attendee separately. This means that you need to repeat the entire process from Step 1 to 4 for each of the people in your group.

Move to Step 1

An orientation page preceded the registration form for the versions with "Discrete Help Topics" and "Help in the UI"

What we learned about orientation

- Orientation information at the start of the task was critical to success
 - Participants didn't seek this information
 - However, when it was presented to them, they read it and benefited from it

Without orientation...

- "What's throwing me here is that I'm registering a group, but the seminars seem to be for individuals. It seems clear that I should choose the group, and deal with the seminars later on."
- "That's interesting - I've told them I'm registering 2-5 people, but they only have one name...I'm worried about sending the registration now - they only have one name."

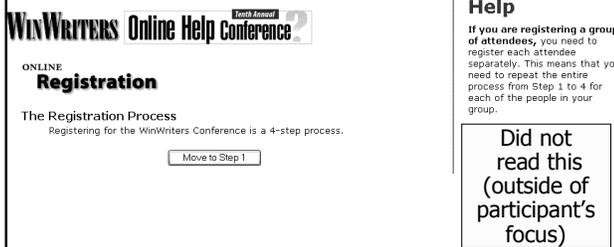
With orientation...

- M: "Happy?"
P: "Yes - it's good that it has all this information."
M: "What are you trying to do?"
P: "I'm trying to register Ann Kirkman"
- "So, I've registered one person - I have only identified that person yet... I have to do each person individually. It did tell me on page one that I had to do the whole process for everyone."

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What we learned 

- Participants did not generally read guidance information unless it was embedded within the task

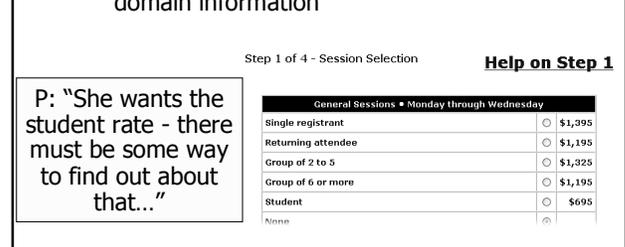


Help
If you are registering a group of attendees, you need to register each attendee separately. This means that you need to repeat the entire process from Step 1 to 4 for each of the people in your group.

Did not read this (outside of participant's focus)

What we learned 

- Participants frequently required prompting to select the Help option
 - They did not expect "Help" to provide domain information

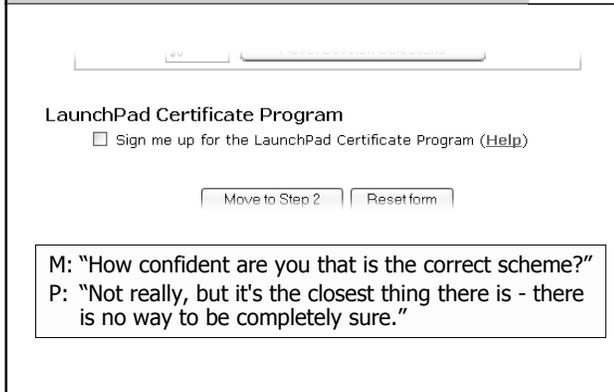


Step 1 of 4 - Session Selection **Help on Step 1**

P: "She wants the student rate - there must be some way to find out about that..."

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Group of 2 to 5	\$1,925
Group of 6 or more	\$1,195
Student	\$695
None	

Further evidence 



LaunchPad Certificate Program

Sign me up for the LaunchPad Certificate Program (Help)

Move to Step 2 Reset form

M: "How confident are you that is the correct scheme?"
P: "Not really, but it's the closest thing there is - there is no way to be completely sure."

Participants learned to use the Help 

- From:
 - M: "How sure are you that Kylie qualifies for the Student discount?"
 - P: [On considering Help link]: "I hate going to Help!"
- To:
 - P: "He's interested in the other certificate program. Let me go check the Help again." [suddenly a Help devotee!]

From that participant: 

- "I think that people don't select the Help because they think they're going to get a lot of information they don't need.

I've always found that, in Windows, the Help button doesn't get you anywhere - it's too broad."

Participants learned to use Help 

- Only 7 out of the 16 participants registered the first attendee accurately

whereas...

- All 11 of the participants (who managed to progress that far) registered the third attendee accurately

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What we learned

- Text links to user assistance were sometimes confused with actions



General Sessions • Monday through Wednesday

Single registrant \$1,395

Returning Conference attendee

Group of 2 to 5

Group of 6 or more

Student

P: "Well, there are 2-5, so I'll click on that."
Selected the Help by clicking on the link - seemed confused.

P: "It's not allowing me to select 2-5 - shall I try Single Registrant?"

What we learned

- Participants read the side-by-side Help only when they caused it to change
 - There was usually a slight delay before they shifted their focus to the right



Designing and Creating HTML-based Help with Dreamweaver

Sunday Afternoon Seminars • 1:30 - 5:00 pm

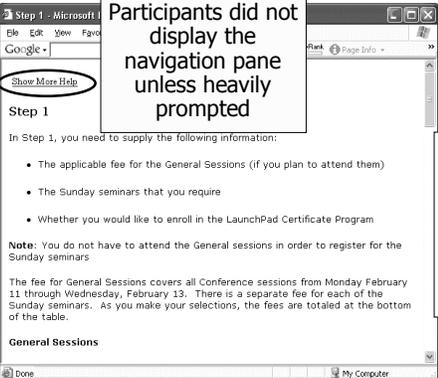
Designing and Creating HTML-based Help with Dreamweaver • HD2
Jason Gervich, [Helping Hand](#) (Help) \$195

Context-Sensitive Help: Crossing the Great Divide Between Writers and Developers • W16
David Locke, WordSmith Ltd, and Paul O'Rear, [Helpful Solutions](#) (Help) \$195

Designing Effective User Assistance: What We Can Learn from Computer Games • D31
Scott DeLoach, [User First Services](#) (Help) \$195

Help
Designing and Creating HTML-based Help with Dreamweaver
Jason Gervich, [Helping Hand](#)
Sunday, 1:30 - 5:00 pm
Experience Level: Novice/Intermediate
— YOU WILL LEARN —
• Steps for creating HTML-based Help with Dreamweaver
• How to plan an HTML-based

The separate Help window



Participants did not display the navigation pane unless heavily prompted

The separate scrolling Help window caused problems for one (of four) of the participants

Step 1 - Microsoft

Show More Help

Step 1

In Step 1, you need to supply the following information:

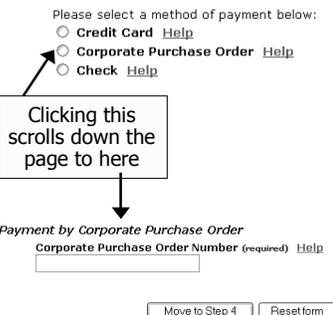
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General Sessions

Mixed response for "auto-scroll"



Please select a method of payment below:

Credit Card [Help](#)

Corporate Purchase Order [Help](#)

Check [Help](#)

Clicking this scrolls down the page to here

Payment by Corporate Purchase Order

Corporate Purchase Order Number (required) [Help](#)

Move to Step 4 Reset form

- "I clicked Corporate PO, and it moved me down when I was still reading the cancellation policy (above). That was annoying!"
- "That's nice! That's very slick!"

What we learned overall

- Advance orientation improves accuracy and the experience
- Participants needed domain knowledge, but did not seek it in "Help"
- Participants learned on the job
- Field level Help was easier to use than page-level Help (but did not have a significantly higher uptake)
- Participants using "Help built into the UI" were most accurate, but not quickest
- Participants using the version with no Help were least accurate

Questions?

Source files and detailed observations for the usability test can be downloaded from www.winwriters.com/stc02

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