Best Practices for Embedded User Assistance

Scott DeLoach

www.userfirst.net
Session overview

- Introduction to embedded UA
- Three types of embedded UA
  - functional (field-level)
  - conceptual
  - procedural
- For each type, we will discuss:
  - user questions
  - display options
  - pros and cons
  - best practices
## Embedded UA and external help

<table>
<thead>
<tr>
<th></th>
<th>Embedded UA</th>
<th>External Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usually developed with a HAT?</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Where are the files stored?</td>
<td>Database or inside code</td>
<td>'Help' folder</td>
</tr>
<tr>
<td>Organizational approach?</td>
<td>Distributed, just in time</td>
<td>Centralized</td>
</tr>
<tr>
<td>Includes navigation?</td>
<td>Usually not needed</td>
<td>TOC, index, search</td>
</tr>
<tr>
<td>Typical topic length?</td>
<td>Extremely short (5-200 words)</td>
<td>one 'screen' (200-1,000 words)</td>
</tr>
<tr>
<td>Main information type?</td>
<td>Functional</td>
<td>Procedural</td>
</tr>
</tbody>
</table>
blended approach

Embedded UA and external help

Context-sensitive external help links

Functional UA (field labels)
blended approach

Embedded UA and external help
Decision points for embedded UA

- What questions do users have?
  - Functional ('What's this?')
  - Conceptual
  - Procedural

- How much screen real estate is available?
  - No space
  - Page overviews
  - Field labels
  - Moving UA area
  - Dedicated UA panel

- Which technologies can you use?
  - JavaScript
  - ASP/VBScript
  - Java/JSP
  - .NET
User questions

Three information types:
- Functional – what?
- Conceptual – why?
- Procedural – how?
User questions

- **Reminders**
  "What does this acronym mean?"

- **Exceptions**
  "What if I have two middle names?"

- **Relationships and dependencies**
  "How do these settings relate to each other?"
functional UA

Display options

Page overviews

✓ Labels
✓ DHTML popup layers
✓ Popup windows
✓ Dedicated UA panel
Field labels – pros and cons

Pro
▪ Very useful and easy to use

Cons
▪ Do not scale well to support all fields
▪ Very limited amount of information
DHTML popups – example

functional UA

nationalcitymortgage.com
DHTML popups – pros and cons

Pro
▪ Can include a large amount of information

Cons
▪ Usually cannot include links
▪ Must be "found" by users
functional UA

Popup windows – example

Card Security Code

The card security code is a unique three or four digit number, separate from your credit card number. Your security code can be found in the following locations on the following cards:

Visa/Mastercard/Discover
Your card security code for your Mastercard, Visa or Discover card is a three-digit number on the back of your credit card, immediately following your main card number.

American Express
The card security code for your American Express card is a four-digit number located on the front of your credit card, to the right or left above your main credit card number.

If your security code is missing or illegible, or, if your account is "plastic-less", please call 1-800-MY-APPLE for assistance with placing your order.

Close this window

apple.com
Popup windows – pros and cons

Pros
- Can use a HAT to develop topics
- Can include links and navigation
- Can include an "unlimited" amount of information

Con
- Often obscure application window
Dedicated panel – example

Helpful Information

Country of Residence: This is required in order for us to provide you with appropriate products. Depending upon your country of residence the rate you are quoted may include certain coverage options, taxes, and other fees. These products are designed to meet the needs of customers traveling abroad to the US. The base rate you will see on the car availability page will reflect this. You can review the product inclusions on the summary page that comes after the car availability page.

To receive a rate inclusive of appropriate products, non-US citizens should leave the Rate Code field blank. If you prefer a car-only rate, you may use one of the promotional codes advertised on the site.

Step 1: Tell us about your trip

* Required Fields

Country of Residence? *
(Select)

Pickup / Dropoff Location
Please enter one ONLY: city, state, country or a 3-letter airport code (for example, Fort Lauderdale or Florida or United States or FLL)
Pickup Location* Find a Location

Pickup Date* Pickup Time*
MAY-2003 12 9:00 AM

Dropoff Location* Find a Location

Dropoff Date* Dropoff Time*
(Select)

Optional Rate Information
This section is not required for rate quote/reservation purposes. If you have a specific rate, promotional, association or coupon code, please enter it here.
Rate Code Promo Code/Assoc. I.D. Corporate I.D.

Check here if you will be making a reservation using an applicant code.
(Note: Users must book rate code EX with a Corporate I.D. in order to use an applicant code).

Optional Flight Information
Enter your applicable flight details. This will help us should your flight be delayed.
Airline Flight Number

alamo.com
Dedicated panel – pros and cons

**Pros**
- Can include a large amount of information
- Very easy to use

**Con**
- Difficult to add to an existing application
Best practices

- Provide examples
- Provide minimums and maximums
- Embed field-level help for required fields
- Link to conceptual and procedural help topics when needed
- Group related field-level topics to increase usability
User questions

- **Navigation**
  "Am I on the right page?"

- **Features and limitations**
  "Can I save this information?"

- **Goals**
  "What can I do with this application?"
Display options

✓ Page overviews
  Labels
✓ DHTML popup layers
  Popup windows
✓ Dedicated UA panel
### conceptual UA

Page overviews – example

**View Contracts**

Click on a report heading to sort by that heading. Click on a Contract ID to view contract detail.

<table>
<thead>
<tr>
<th>Contract ID</th>
<th>Type</th>
<th>Status</th>
<th>GPO Contract Num</th>
<th>HCP</th>
<th>GPO</th>
<th>MFG</th>
<th>DIST</th>
<th>Effective</th>
<th>Termination</th>
<th>Protection</th>
<th>TOD Req</th>
</tr>
</thead>
</table>

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[medassets.com](http://medassets.com)
### View Contracts

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<th>GPO</th>
<th>Contract HCP</th>
<th>GPO_MFG</th>
<th>DIST</th>
<th>Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>172</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource 3M Health Care</td>
<td>Abbott Hospital</td>
<td>01.Jul.1996</td>
<td></td>
<td></td>
</tr>
<tr>
<td>174</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Products Div</td>
<td>Abbott Hospital</td>
<td>01.Apr.1998</td>
<td></td>
<td></td>
</tr>
<tr>
<td>178</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Products Div</td>
<td>Abbott Hospital</td>
<td>01.Apr.1999</td>
<td></td>
<td></td>
</tr>
<tr>
<td>178</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Aesculap Inc</td>
<td>Abbott Hospital</td>
<td>01.Jun.1999</td>
<td></td>
<td></td>
</tr>
<tr>
<td>177</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Inc</td>
<td>Alba-Walensian</td>
<td>01.Mar.1999</td>
<td></td>
<td></td>
</tr>
<tr>
<td>177</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Inc</td>
<td>Allegiance Healthcare Corp</td>
<td>Healthcare Supply / Scientific</td>
<td></td>
<td></td>
</tr>
<tr>
<td>179</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Products</td>
<td>Alba-Walensian</td>
<td>01.Jul.1998</td>
<td></td>
<td></td>
</tr>
<tr>
<td>179</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Alpha Source</td>
<td>Angelina Uniform Group Div</td>
<td>01.Nov.1997</td>
<td></td>
<td></td>
</tr>
<tr>
<td>181</td>
<td>MA</td>
<td>ACTIVE</td>
<td>InSource Ansell Perry</td>
<td>The Kendall Co Ltd</td>
<td>01.Aug.0095</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**What is a contract?**

A contract is a binding agreement between two or more persons or parties or a business arrangement for the supply of goods or services at a fixed rate. Each product has an assigned ID, type, and status.

The contract ID is a unique number that is assigned by MedAssets.com when the contract is created.

The contract type can be a Direct Agreement (DA), Dual Source Contract (DS), Manufacturing Direct Agreement (MD), Master Agreement (MA), Multi-source Contract (MC), Participation Agreement (PA), Sole Source Contract (SS).

The status can be active, inactive, on hold, or pending.
Page overviews – pros and cons

Pro
- Appear in a prominent position, so they are more likely to be read

Con
- Usually ignored if longer than ~2 sentences
DHTML popups – example
DHTML popups – pros and cons

Pro
▪ Save space by layering information

Cons
▪ Can be confusing to novices
▪ Opener can be confused with a hyperlink
How do e-Bills make paying bills more convenient?
Paying your bills online is even easier and faster when you receive e-Bills. An e-Bill is just like the paper statement you receive in the mail—the same information without the paper. With e-Bills, you can receive and pay your bill online in the same place.

How do e-Bills work?
Many of the companies on our payee list can send e-Bills. After you request e-Bills from one of your payees, the payee starts sending your bill online to Bill Pay. You control the payment amount and date of each e-Bill you pay.

New e-Bills appear in several places in Bill Pay, including the Incoming e-Bills box on the Bill Pay Overview page and on the e-Bills Overview page.

Request e-Bills
You can request e-Bills from the following payees that you've already added to your payee list.

- Bankcard Services
  - Edward Jones MC - 8065
- Citibank Credit Card
  - citi bank personal card - 4687
- Shell Energy Services
  - gas bill - 445-9

Why aren't all of my payees listed here?
Only the payees you've added that can send e-Bills are listed. Search or browse our list of payees that can send e-Bills

Payees That Send You e-Bills
You already receive e-Bills from the following payees.

- Chrysler Financial
  - car loan - 1284
  - e-Bill automatic payment set up
- Georgia Power
  - power bill - 05 03
  - e-Bill automatic payment set up

Edit e-Bill information
Edit e-Bill automatic payment
Dedicated panel – pros and cons

**Pros**
- Can provide adequate answers to multiple questions
- Very easy to use

**Con**
- Difficult to add to an existing application
Best practices

- Embed vital information and warnings
- Explain key tasks and why they might be performed
- Define key concepts
- Link to external help topics for background, introductory, and advanced information
Task steps
"How do I complete my task?"

High-level process
"What do I do next?"

Expectations
"How long will this take?"
procedural UA

Display options

Page overviews

Labels

✓ DHTML popup layers

Popup windows

✓ Dedicated UA panel
procedural UA

DHTML popups – example

Stamps & Merchandise
11:17 AM Thu, May 22, 1997

Scan, enter or select an item

For Quantity Greater than 1, Key in the quantity then Press [Quantity] static Key

To sell envelopes:
1. Scan, enter or select an item.
2. Select/enter a stationary product.
3. Select/enter box lot envelope type.
4. Specify whether there are any box lots.
5. For box lots, enter the quantity for each box lot sold.

To go back a step, press [Help] then press [Previous Screen].

USPS (in post office)
DHTML popups – pros and cons

Pros

▪ Can include detailed instructions
▪ Can appear in the main task area to keep the user focused

Cons

▪ UA temporarily replaces part of the UI
▪ Opener can be confused with a hyperlink
procedural UA

Dedicated panel - example

To notify HR about a change in military service:

1. In the Military Status field, select your new military status.
2. Click Save Changes.
3. On the remote control, click Policy.
5. Click OK.

You will receive an email confirmation when your information has been processed by HR.

Ceridian prototype
Dedicated panel – pros and cons

**Pros**
- Always available—user does not have to ask for help
- Easy to see the help and the application at the same time

**Con**
- Difficult to add to an existing application
Best practices

- Embed UA for most commonly performed tasks
- Link to external help for less commonly performed and complex tasks
- Highlight the current step to focus the user
- Provide time estimates for longer tasks
- Position tasks with higher-level processes
Embedded UA best practices

- Provide information at the point of use
- Write topics to answer user questions
- Combine embedded UA with external help
- Provide focused help links ('Tell me more,' 'Tips,' 'Why?')
## Embedded UA approach comparison

<table>
<thead>
<tr>
<th></th>
<th>Labels</th>
<th>DHTML popups</th>
<th>Popup windows</th>
<th>Dedicated panel</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amount of information</strong></td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td><strong>Links and navigation</strong></td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td><strong>Ease of use</strong></td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td><strong>Ease of retrofitting into an existing application</strong></td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
<tr>
<td><strong>Ease of implementing with a new application</strong></td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
<td>![Icon]</td>
</tr>
</tbody>
</table>

- **Conclusion**
  - Poor: ![Icon] Poor
  - Good: ![Icon] Good
conclusion

Example embedded UA sites

eloan.com
nationalcitymortgage.com
apple.com
alamo.com
msdn.microsoft.com
bankofamerica.com
Feel free to e-mail me. Or, catch me later at the conference!

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