



Best Practices for Embedded User Assistance

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userfirst
s e r v i c e s

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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



combined approach

Embedded UA and external help

The screenshot shows the Monster Job Search homepage. At the top, there is a navigation bar with links: Home, Search Jobs, My Monster Login, Network Now, Career Advice, Help, and For Employers. Below this is the Monster logo and the text 'monster Job Search'. A section titled 'Try a Specialized Search:' contains several links: Healthcare, Government, Hourly/Skilled, Diversity & Inclusion, College/Entry Level/Internship, and Volunteer Opportunities. There are three input fields: 'Enter Key Words:' with a placeholder '(example: sales, java, nurse) more tips...', 'Enter Company Name:' with a placeholder '(example: Monster) more tips...', and 'Choose Location:' with a dropdown menu showing options like 'Alabama-Anniston', 'Alabama-Birmingham', etc. Below that is 'Choose Job Category:' with a dropdown menu showing options like 'Accounting/Auditing', 'Administrative and Support Services', etc. At the bottom of the search area, there are radio buttons for 'Sort Results by:' (Date, Key Word Relevance) and 'View Description:' (Brief, Detailed). A 'Get Results' button is present. A link 'Need Help Searching?' is located below the search area. On the right side, there is a 'Specialized Search' section with a list of categories: Admin/Support, Finance, Human Resources, Management, Public Service, Sales, Technology, and Volunteer Opportunities. Below this are sections for 'Free Career Advice', 'Monster Networking:', 'NEW: Free Business Cards Visit the Print Center', 'Relocating? Monstermoving', 'Looking for courses? MonsterLearning', 'Considering the Military? Military.com', and 'Self-Employment: Be the Boss'. A 'Context-sensitive external help links' label with arrows points to the 'Need Help Searching?' link and the 'Specialized Search' section. A 'Functional UA (field labels)' label with arrows points to the 'Enter Key Words:' and 'Enter Company Name:' labels.

Context-sensitive external help links

Functional UA
(field labels)



combined approach

Embedded UA and external help

The image shows a screenshot of the Monster Job Search website. The main page features a navigation bar with links: Home, Search Jobs, My Monster Login, Network Now, Career Advice, Help, and For Employers. The 'Help' link is highlighted with a green box, and a green arrow points down from it to an embedded help window. The main content area includes the Monster logo, a search bar with fields for 'Enter Key Words', 'Enter Company Name', and 'Choose Location', and a 'Get Results' button. The embedded help window, titled 'http://jobsearch.monster.com/help/index.asp?ma=/index.asp&q= - Microsoft I...', contains a cartoon monster illustration and sections for 'Search Jobs', 'Safe Job Searching', 'Keyword Search', and 'Company Search'. The 'Keyword Search' section provides instructions on how to use keywords and lists examples like 'programmer', 'truck driver', and 'SAP'. The 'Company Search' section prompts the user to enter a company name.



comparison

Embedded UA and external help

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



Three types of user questions

- Functional – what?
- Conceptual – why?
- Procedural – how?



functional UA

User questions

- **Reminders**

"What does GIF mean?"

- **Exceptions**

"What if I have two middle names?"

- **Relationships and dependencies**

"How do two options relate to each other?"



functional UA

Display options

Page overviews

- ✓ Labels
- ✓ DHTML popup layers
- ✓ Dedicated UA panel



functional UA

Field labels – example

Refinance your mortgage with E-LOAN - Microsoft Internet Explorer

Apply now!

Takes 4 minutes, get a decision in 90 seconds, and get a call back in 15 minutes.
The first step in applying is to create or log in to your My E-LOAN® account so that your application data will be saved at every step.

Choose a username and password: [Already have a password? LOG IN](#)

First name: M.I.: Last name:

Username: (3-24 characters)

Remember my username (not password).

Password: (6-10 characters) **Password:** (verify)

If you forget your password we will verify your identity by asking you the following question and will email your new password to the address below.

Question: e.g., My spouse's name **Answer:** e.g., Chris

Email address: Email address: (verify)

Phone Number: --

Privacy Notice:

To opt out of marketing communications, [click here](#).
[Click here](#) to learn how we use the personal identifiable information collected above.

[CONTINUE](#)

Search Rates

Search Rates
Compare between hundreds of loans in seconds.
[SEARCH RATES](#)

[Calculate refinance savings](#)
Have E-LOAN find the loans that will save me the most.

[Home equity or refinance?](#)
Let us determine which loan will get you cash at a lower cost.

Bad credit?
Everyone deserves a great rate. Let us help you.
[Learn more](#)

Not finding the loans you want?
View our entire selection.
[Learn More](#)

[Tools & Calculators](#)
[Mortgage Basics](#)
[Loan Process](#)
[Recommend a loan](#)
[Mortgage Newsletters](#)



functional UA

DHTML popups – example

The screenshot shows a Microsoft Internet Explorer browser window displaying the National City Mortgage website. The page title is "Access Your Mortgage Account - Microsoft Internet Explorer". The browser's address bar shows the URL "http://www.nationalcitymortgage.com/". The page content includes a navigation menu with links like "HOME", "ABOUT US", "CAREERS", "LOCATIONS", "PRIVACY NOTICE", and "SEARCH". A sidebar on the left contains links for "Customer Service Center", "Access Your Mortgage Account", "Learn More", "Special Bulletins", "Review Your Payment Options", "Make Your Last Payment", "Having Trouble Making Payments?", "Understanding Insurance", "Other National City Products", "Contact Information", "Calculators", "Contact Us", "Mortgage FAQ's", and "Glossary". The main content area features a "Access Your Mortgage Account" section with a "PMI Information" table and a "Can Your PMI Be Removed?" section. A red box highlights a DHTML popup that appears over the text "you may request cancellation of your PMI on or after the date the principal balance of your loan:". The popup contains the following text: "No payments 30 or more days past due within one year and no payments 60 days or more past due within two years of the cancellation date." Below the popup, there are two bullet points: "Is first scheduled to reach 80% of the original value of the property (80% LTV)." and "Actually reaches 80% of the original value of the property."

Access Your Mortgage Account - Microsoft Internet Explorer

File Edit View Favorites Tools Help Send

National City Mortgage

HOME ABOUT US CAREERS LOCATIONS PRIVACY NOTICE SEARCH

Mortgage Application Center Customer Service Center Product Information Center Mortgage Learning Center

Customer Service Center | Access Your Mortgage Account

Customer Service Center

Access Your Mortgage Account

Learn More

Special Bulletins

Review Your Payment Options

Make Your Last Payment

Having Trouble Making Payments?

Understanding Insurance

Other National City Products

Contact Information

Calculators

Contact Us

Mortgage FAQ's

Glossary

Access Your Mortgage Account

PMI Information Wednesday, March 03, 2004

Loan Number:	9999999
Borrower Name:	D Scott DeLoach
Borrower SSN/TIN:	999-99-9999

Private Mortgage Insurance (PMI) Information

Estimated LTV (loan-to-value):	83.6%
Origination Date:	11/21/1997
Number of Times 30+ Days Delinquent (Previous 12 Months):	0

Can Your PMI Be Removed?

The Homeowners Protection Act of 1998 gives you the right to request cancellation of the private mortgage insurance (PMI) premium that is added to your loan payments. If you do not request cancellation, the law also provides rules for automatic termination of PMI. The law applies to mortgage loans on single family, primary residences originated on or after July 29, 1999 where the borrower is paying the cost of the PMI.

Note: Some [investors](#) and some [states](#) have different rules regarding PMI, which may be more or less restrictive. Also, loans categorized as "high risk" may have separate rules apply. We encourage you to contact us if you have any question as to whether or not your loan is eligible for PMI cancellation.

If you have a good payment history, you may request cancellation of your PMI on or after the date the principal balance of your loan:

No payments 30 or more days past due within one year and no payments 60 days or more past due within two years of the cancellation date.

- Is first scheduled to reach 80% of the original value of the property (80% LTV).
- Actually reaches 80% of the original value of the property.

nationalcitymortgage.com



functional UA

Dedicated panel – example

alamo.com

[RATES & RESERVATIONS](#)
[LOCATIONS](#)
[CARS](#)
[HOT DEALS](#)
[EXISTING RESERVATION](#)

>> membership >> business travel >> programs >> travel tools >> rental policies >> contact us

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*

MAY-2003 ▼
12 ▼

Pickup Time*

9:00 AM ▼

Dropoff Location*

(Select) ▼ ▼

Dropoff Date*

▼

Dropoff Time*

9:00 AM ▼

Dropoff Time*

9:00 AM ▼

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.

Coupon Code

Check here if you will be making a reservation using an applicant code.
(Note: Users must book rate code BX 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



functional UA

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

conceptual UA



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?"



conceptual UA

Display options

✓ Page overviews

Labels

✓ DHTML popup layers

✓ Dedicated UA panel

conceptual UA

Page overviews – example

HOME LOGIN LOGOUT IN SOURCE A MedAssets.com

July 12, 2000

View Contracts

About this window
You can view contract information from the View Contracts web page.

What is a contract?

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

Contract ID	Type	Status	GPO Contract Num	HCP	GPO	MFG	DIST	Effective	Termination	Protection	LOD Req.
173	MA	ACTIVE			InSource	3M Health Care		01.Jul.1996	31.Dec.1999	31.Dec.1998	Y
174	MA	ACTIVE			InSource	Abbott Hospital Products Div		01.Apr.1998	31.Dec.2005	31.Dec.2001	N
175	MA	ACTIVE			InSource	Abbott Hospital Products Div		01.Apr.1999	31.Mar.2005	31.Mar.2000	N
176	MA	ACTIVE			InSource	Aesculap Inc		01.Jun.1998	31.May.2001	31.May.2001	N
177	MA	ACTIVE			InSource	Albahealth Products Div Alba-Walensian Inc		01.Mar.1999	28.Feb.2004	28.Feb.2001	N
178	MA	ACTIVE			InSource	Allegiance Healthcare Corp Hospital Supply / Scientific Products		01.Jul.1998	30.Jun.2002		N
179	MA	ACTIVE			InSource	Alpha Source		01.Nov.1997	31.Oct.2000	01.Nov.1998	N
180	MA	ACTIVE			InSource	Angelica Uniform Group Div		01.Jul.1997	30.Jun.2002	30.Jun.1998	N
181	MA	ACTIVE			InSource	Ansell Perry The Kendall Co Lp Div		01.Aug.0095	31.Oct.0002	31.Oct.0001	Y

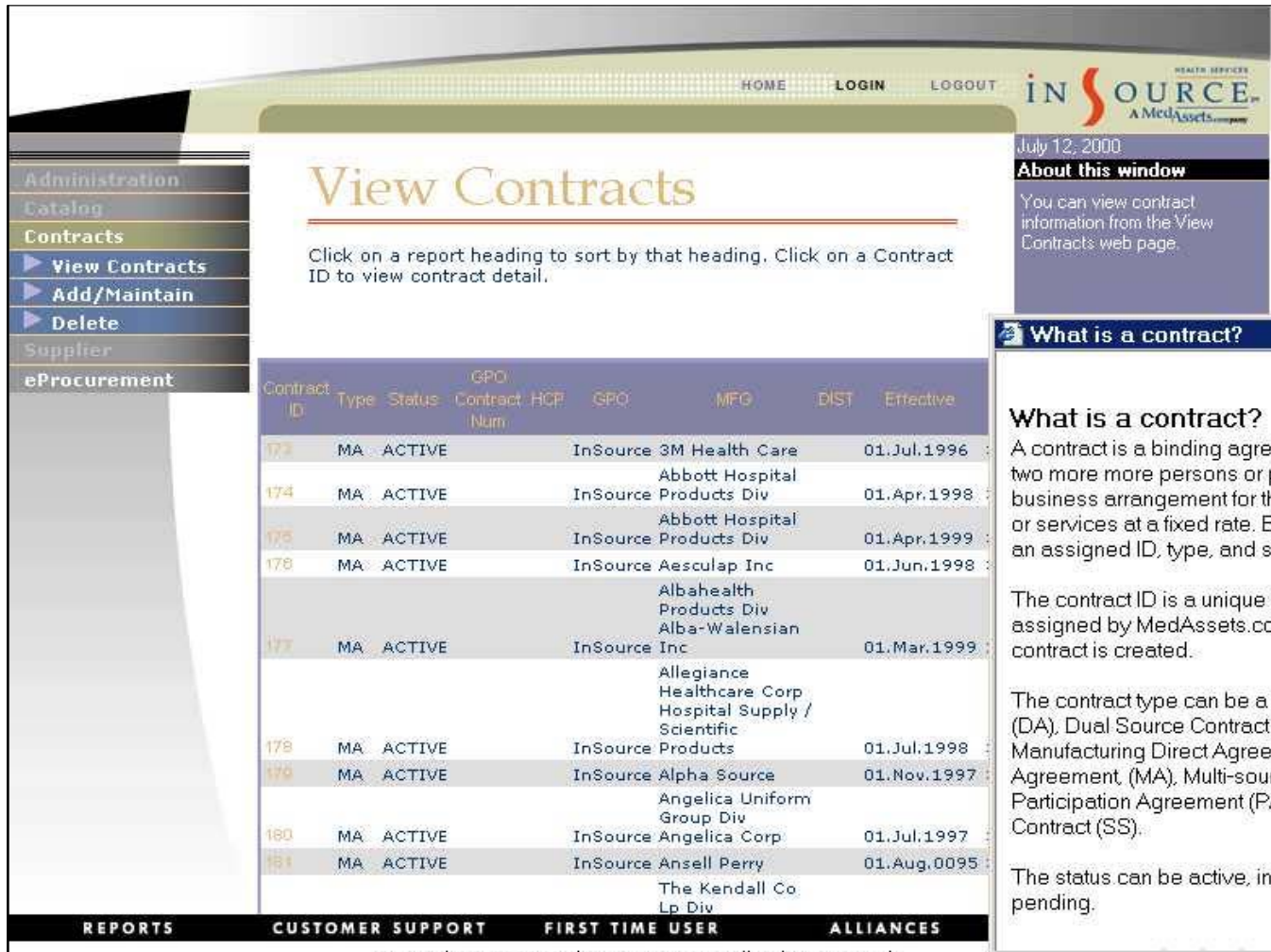
REPORTS CUSTOMER SUPPORT FIRST TIME USER ALLIANCES CONTACT US

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medassets.com

conceptual UA

Page overviews – example



HOME LOGIN LOGOUT IN SOURCE HEALTH SERVICES A MedAssets.com

July 12, 2000
About this window
You can view contract information from the View Contracts web page.

View Contracts

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

Contract ID	Type	Status	GPO Contract Num	HCP	GPO	MFG	DIST	Effective
172	MA	ACTIVE			InSource	3M Health Care		01.Jul.1996
174	MA	ACTIVE			InSource	Abbott Hospital Products Div		01.Apr.1998
175	MA	ACTIVE			InSource	Abbott Hospital Products Div		01.Apr.1999
176	MA	ACTIVE			InSource	Aesculap Inc		01.Jun.1998
177	MA	ACTIVE			InSource	Albahealth Products Div Alba-Walensian Inc		01.Mar.1999
178	MA	ACTIVE			InSource	Allegiance Healthcare Corp Hospital Supply / Scientific Products		01.Jul.1998
179	MA	ACTIVE			InSource	Alpha Source		01.Nov.1997
180	MA	ACTIVE			InSource	Angelica Uniform Group Div		01.Jul.1997
181	MA	ACTIVE			InSource	Ansell Perry The Kendall Co Lp Div		01.Aug.0095

What is a contract?

What is a contract?
A contract is a binding agreement between two more more persons or parties or a business arrangement for the supply of good 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).

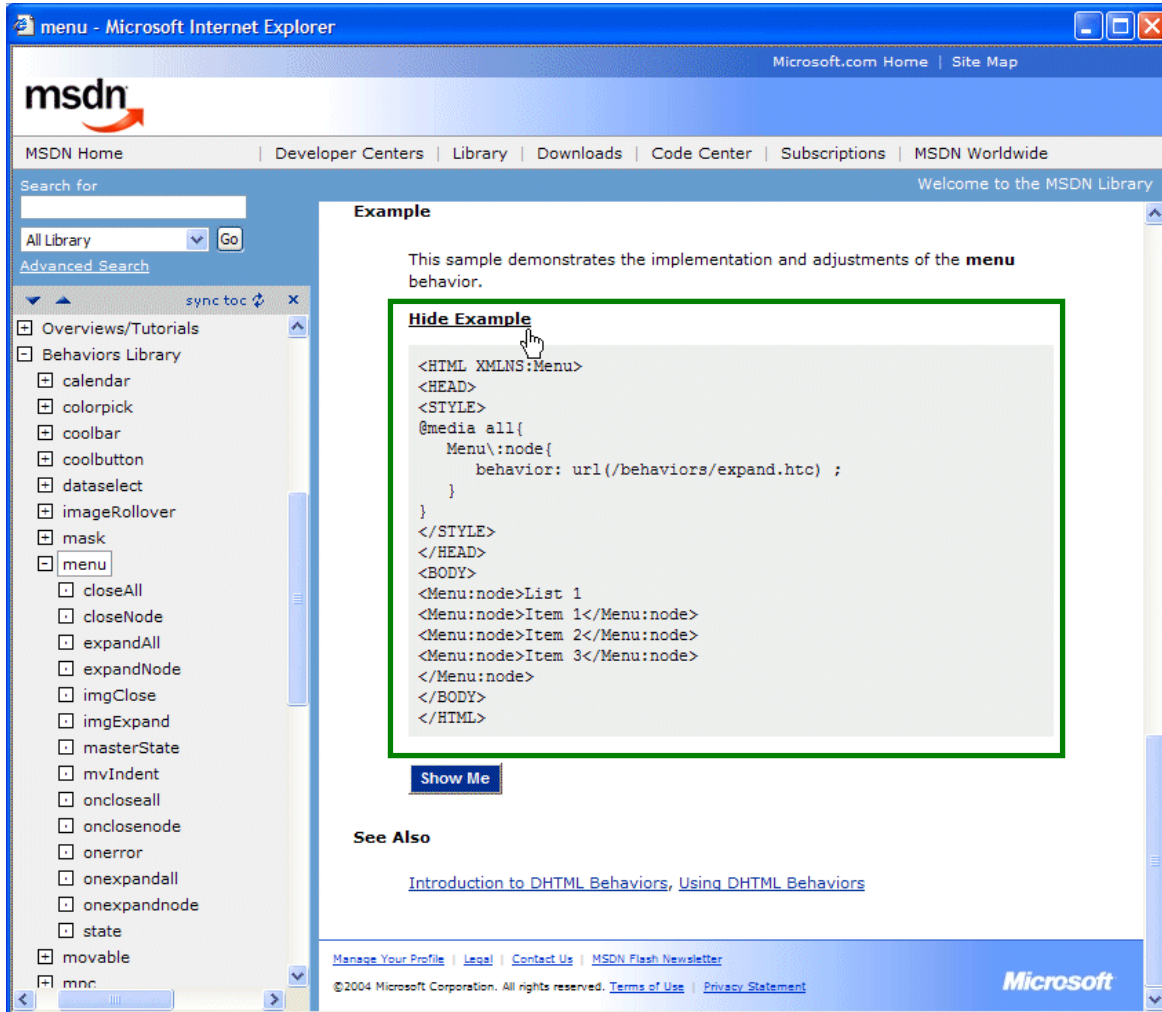
The status can be active, inactive, on hold, or pending.

REPORTS CUSTOMER SUPPORT FIRST TIME USER ALLIANCES

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conceptual UA

DHTML popups – example



The screenshot shows a Microsoft Internet Explorer browser window displaying the MSDN website. The page title is "menu - Microsoft Internet Explorer". The MSDN logo is visible at the top left. The navigation bar includes links for "MSDN Home", "Developer Centers", "Library", "Downloads", "Code Center", "Subscriptions", and "MSDN Worldwide". A search bar is present on the left side. The main content area is titled "Example" and contains the following text:

This sample demonstrates the implementation and adjustments of the **menu** behavior.

Hide Example

```
<HTML XMLNS:Menu>
<HEAD>
<STYLE>
@media all{
  Menu\:node{
    behavior: url(/behaviors/expand.htc) ;
  }
}
</STYLE>
</HEAD>
<BODY>
<Menu\:node>List 1
<Menu\:node>Item 1</Menu\:node>
<Menu\:node>Item 2</Menu\:node>
<Menu\:node>Item 3</Menu\:node>
</Menu\:node>
</BODY>
</HTML>
```

Show Me

See Also

[Introduction to DHTML Behaviors, Using DHTML Behaviors](#)

The footer of the page includes links for "Manage Your Profile", "Legal", "Contact Us", and "MSDN Flash Newsletter", along with the copyright notice "©2004 Microsoft Corporation. All rights reserved." and the Microsoft logo.

conceptual UA

Dedicated panel – example

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

[Request e-Bills](#)

[Citibank Credit Card](#)

citi bank personal card -4687

[Request e-Bills](#)

[Shell Energy Services](#)

gas bill -445-9

[Request e-Bills](#)

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

[Edit e-Bill information](#)

[Edit e-Bill automatic payment](#)

[Georgia Power](#)

power bill -05 03

e-Bill automatic payment set up

[Edit e-Bill information](#)

[Edit e-Bill automatic payment](#)



conceptual UA

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



procedural UA

User questions

- **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
- ✓ 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

0 lbs. 0.00 oz.

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].

Loose Stamps 

Coils 

Postal Stationary 

Packaging/Retail Products 

Philatelic Products/Booklets/Bird Stamps 

Print PVI Label 

Certificate of Mailing 

Exchange Item 

USPS (in post office)



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**.
4. Select **Policies and Procedures**.
5. Click **OK**.

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

Personal Information Form

Name: Web,User

HRID: 111-11-1111



Birth Date:

Ethnicity:

<- Select ->

Sex:

- Female
 Male

Marital Status:

- Single
 Married

Military Status:

<- Select ->

Cancel

Do NOT Save Changes

Save Changes

Save Changes

Ceridian prototype



procedural UA

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



conclusion

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?'*)

conclusion

Embedded UA comparison



	Page Overviews	Labels	DHTML popups	Dedicated panel
Amount of information				
Links and navigation				
Ease of use				
Ease of adding to an existing application				
Ease of using in a new application				

Poor Good



Questions?

Feel free to e-mail me. Or, catch me later at the conference!

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