Feature

Combining Embedded User Assistance and External Help Systems

By Scott DeLoach

Embedded user assistance (UA) is any instructional or conceptual information that appears inside an application. It can be used to provide in-context answers to common user questions. However, embedded UA is not a replacement for a help system. In many best-in-class examples, the embedded UA includes a context-sensitive link to an external help system for more in-depth information.

Consider the following password field in an application:

Password: [   ]

Users might have the following common questions about creating a password:

- How short/long can my password be?
- Can I use spaces and special characters?

We could add embedded UA to answer many of these questions:

Password: [   ]
(4-8 characters, A-Z, a-z, or 0-9) more…

This embedded UA should help most users successfully create a password. The "more…" link could open a help topic that provides more information about passwords and security, as in the following examples:

- Why you need a password
- Examples of good and bad passwords
- How often you will need to (or should) change your password
- How to retrieve a lost password

Why Both Embedded UA and an External Help System Are Important

Most user questions should be answered at the point of use (or rather, the point of confusion) using embedded UA. To the user, embedded UA provides a large benefit with little to no effort. After using embedded UA, users are much more likely to click on help links and spend more time using an external help system. However, embedded UA must fit inside the application, often using 20-50 characters. There is rarely enough space to provide detailed information.

An external help system is an excellent approach to providing in-depth conceptual information, procedures, and troubleshooting advice. The weakness of an external help system is that it's a passive, external resource. The user has to realize they need assistance, open the help, locate the relevant information, and return their focus to the application. For

many questions, this process feels like too much effort for the perceived benefit. As a result, many users do not use an external the help system.

When combined, embedded UA and an external help system can provide both quick answers and detailed explanations.

Answering Basic Questions

The most common question that users have is "What do I type into this field?". Unfortunately, poorly written field descriptions are a major reason that users think that help systems are not useful. It only takes a few field descriptions like "First Name – Enter your first name" to convince users that opening the help is a waste of time.

In most cases, the user only has a basic question such as, "What is the maximum number of characters I can type into this field?" These questions should be answered as part of the field label. In the screenshot below, the "Enter Key Words" field label includes examples to help the user.

If the user clicks the "more tips" help link, the "Search Jobs" help topic appears with more information.

FAQ
Job Search Quick Tour

Search Jobs

Safe Job Searching

Read our tips for a Safe Job Search.

Keyword Search

Enter Keywords for the Job Titles and Job Descriptions you would like to see. Keywords are words, phrases, and terms that you can enter to describe educational and professional experiences, skills, and company names. They will be used to search for Jobs containing those words in their Titles or Descriptions. By typing in various Keywords, you will maximize your chances of retrieving Jobs that most accurately match what you're looking for.

Examples include programmer, truck driver, SAP, telecommunications, human resources, marketing, sales, cashier, manager, etc.

For more information, consult our Keyword Search Tips.

Answering Advanced Questions

Embedded UA panels can be used to answer advanced questions, such as "Why do you need this information?" In many applications, they appear and disappear (to save space) when the user clicks on a help link. However, some applications provide dedicated UA panels.

In the example below, the Alamo website (**www.alamo.com**), includes a static UA panel to assist customers as they rent a car. The UA panel's topics focus on why the user should provide the requested information, how this information is used, and how to handle special cases. The UA panel is large enough to answer numerous questions, and it can link to help topics in an external help window if needed.

Since the UA panel is always on the screen, the Alamo website uses JavaScript to automatically describe the field that has focus. The user never has to ask for help, and relevant assistance is always available on the screen.

Embedded UA is not limited to text and graphics. Download.com (**www.download.com**) provides excellent instructional videos that users can watch while they download applications.

Conclusion

The biggest mistake help authors make when developing embedded UA is trying to replace their external help with embedded UA. The best user assistance combines both embedded UA and external help to capitalize on their strengths and minimize their weaknesses. I encourage you to use these examples and ideas as a starting point as you design your UA systems.

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Scott DeLoach *is a founding partner of **User First Services**, an Atlanta-based consulting company that specializes in designing and creating user assistance. Over the last 15 years, Scott has presented over 70 papers on web-based Help, embedded user assistance, interface design, usability, and JavaScript coding at conferences across the US and Canada, and around the world. He is a certified Flare, RoboHelp, and Captivate instructor and is the author of* MadCap Flare for RoboHelp Users.