



Best Practices for User Assistance (UA)

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Overview

- ❑ Formatting and writing guidelines
 - ❑ Linking guidelines
 - ❑ Best practice UA example
 - ❑ UI label guidelines
 - ❑ Error message guidelines
 - ❑ UA link guidelines
-

Users use help



Fact: 20% of users admit to using help daily.
59% of users admit to using help monthly.

- Martin et al. (2005)

Help does help



Fact: Users are more successful if they use help.

- Renkl (2002), Wood (2001), Wood & Wood (1999)

Fact: Users learn from help.

- Renkl (2002), Wood (2001), Wood & Wood (1999)

Formatting and writing guidelines

- What font and font size work best?
- How do users use help?
- What are they looking for?

Use 12pt or 14pt type



Fact: Users have trouble reading text below 10pt.

- Bernard, et al. (2003 and 2001d), Fukuda & Bubb (2003), Ownby et al. (2003), Schmidt, et al. (2003)

Fact: Users (esp. 65+) prefer 12pt or 14pt.

- Bernard, et al. (2003 and 2001d), Fukuda & Bubb (2003), Ownby et al. (2003), Schmidt, et al. (2003)



Use Arial or Helvetica



Fact: Users prefer Arial over Verdana and Tahoma, especially Arial 14pt.

- Bernard, et al. (2001a, 2001b, 2001c)

Font comparison

Arial

After Estonia regained independence in 1991, a public debate ensued on the chosen English language name for Estonia. Many Estonians tend to identify more with Northern Europe, and would prefer the country to have a more Nordic-sounding name. The most widely-known of these alternative English language names is *Estland*.

Verdana

After Estonia regained independence in 1991, a public debate ensued on the chosen English language name for Estonia. Many Estonians tend to identify more with Northern Europe, and would prefer the country to have a more Nordic-sounding name. The most widely-known of these alternative English language names is *Estland*.

Tahoma

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Provide quick answers



Fact: Users focus on minimizing effort rather than maximizing learning.

- Alevan, et al. (2006), Baker, et al. (2004)

Fact: Users are focused on their task and cannot focus on learning.

- Paas, et al. (2003)

Limit sentences to 20 words



Fact: Users scan—they do not read long sentences or paragraphs.

- Bailey (2000), Spool, et al. (1998)

Long vs short sentences

32 words

Iceland was one of the last large islands uninhabited by humans until it was discovered and settled by immigrants from Scandinavia and from Ireland and Scotland during the 9th and 10th centuries.

9 and 18 words

Iceland was one of the last uninhabited large islands. It was discovered and settled by immigrants from Scandinavia, Ireland, and Scotland during the 9th and 10th centuries.

- www.wikipedia.org

Write overviews for novices



Fact: **Novices** use overviews to remember information and build knowledge.

Experts are slowed down by overviews and try to skip them.

- Kalyuga, et al. (2003), Kardash & Noel (2000)

Include examples

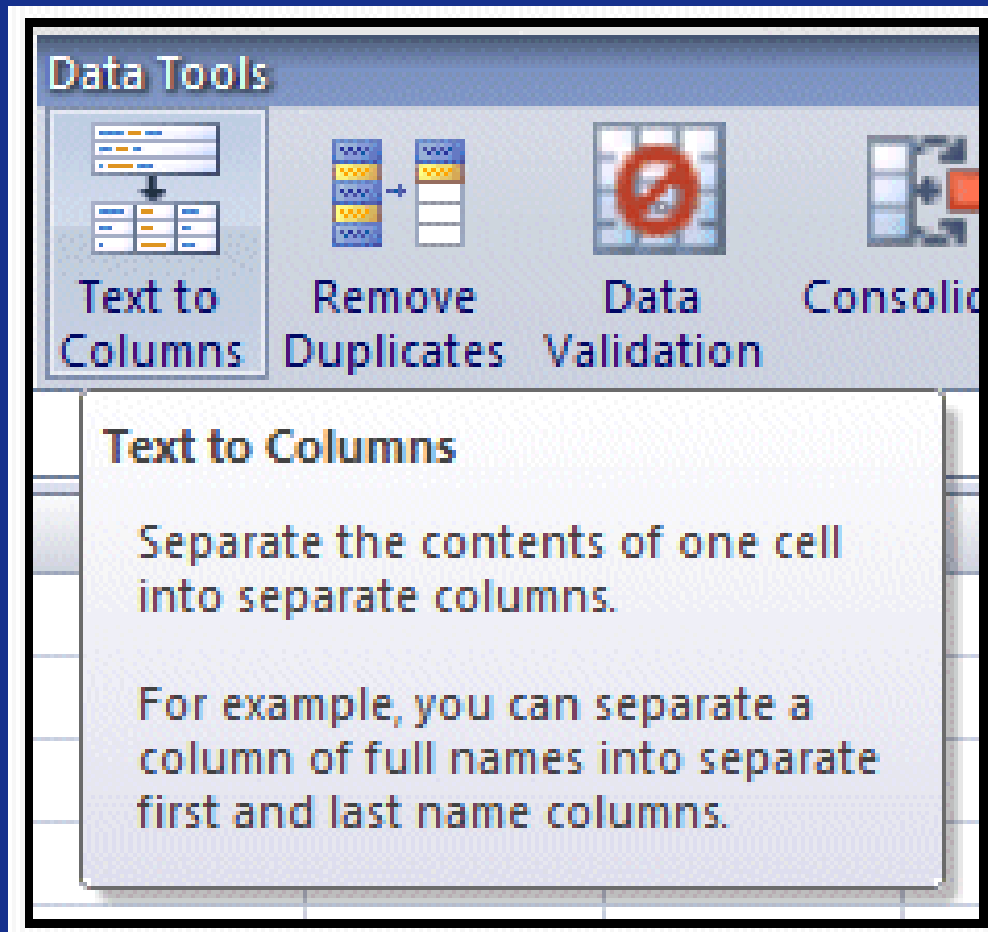


Fact: Users learn from examples.

- Große & Renkl (2006)

Fact: Users want examples.

- Moallem (2003)



- "Super Tool Tips" in Microsoft Office 2007

Linking guidelines

- Where should links appear?
 - What should links look like?
-

Position links on the first "screen"



Fact: Users spend 80% of their time on the first 'screen.'

- Fukuda & Bubb (2003), Bernard et al. (2001b),
Bailey et al. (2000), Byren et. al. (1999)

Fact: Users do not prefer links to be placed at the bottom of the topic.

- Fukuda & Bubb (2003), Bailey et al. (2000),
Bernard et al. (2001b), Byren et. al. (1999)

Provide links on the right side



Fact: Users click on links in the right margin with more efficiency than topics on the left because they are closer to the scroll bar.

- Reuning (2004), McCarthy et al. (2003), Bailey (2000), Kalbach & Bosenick (2000)

Type in the word(s) to search for:

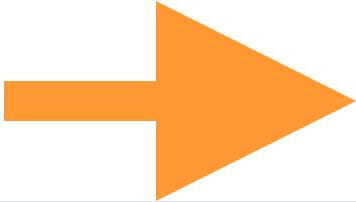
- Case Detail
- Escalate Case
- Index
- New Case
- Remove Escalation
- Table of Contents

Removing an Escalation Request

What can I do on this page?

You can use the Remove Escalation page to cancel escalation of a case. The case will no longer be flagged for manager attention.

You might remove an escalation request if you have resolved the issue or you have discussed the case with your manager.



Related Information

- [Adding a case note](#)
- [Adding a case](#)
- [Escalating a case](#)
- [Viewing case details](#)
- [Viewing case notes](#)

What can I do on this page?

[To remove a case escalation request](#)

1. Open the Case Detail page for the appropriate case.
You can search for a case, open it from a work list, or open it from the subscriber's Account Overview page, Case History section.
2. Click **Remove Escalation**.
3. If appropriate, provide information about the case.
4. If appropriate, add a case note.
5. To save your work, click **Save and Go to Case Detail**.
The Case Detail page appears.
6. If you are finished, close the case. Click **Close**.
The subscriber's Account Overview page appears.

To send the case for further research, click **Send for Internal Research**.
The subscriber's Account Overview page appears.
7. To send the case to CheckFree, click **Send to CheckFree**.
The subscriber's Account Overview page appears.

- CheckFree Corporation's PartnerCare help system

Use text links, not image links



Fact: Users prefer text links, partially because they change color.

- McElwain, et al. (2002), Spool, et al. (1998)

Fact: Users prefer text links to icon links.

- McElwain, et al. (2002)



Use descriptive link text



Fact: Users can be confused by similar link labels.

- Miller & Remington (2004), Reuning (2004)

Identify link targets



Fact: Users assume that a link goes to a new page on the same site.

- Spool, et al. (1998)

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NASA DOCUMENTS



Adobe = .pdf
(Portable Document Format)



= .doc
(MS Word)



= .ppt
(MS PowerPoint)



= www
(External Link)



[2/09/2005: Earth-Sun Exploration Division's Education & Public \(E&PO\) Outreach All-Hands Meeting](#)

At the February 9, 2005, Earth-Sun Exploration Division's Education & Public (E&PO) Outreach All-Hands Meeting, David Herring gave an introductory overview presentation in which he set forth a vision for better aligning our efforts as a function of target audience. Two independent assessments—one by Herring and one by Harmonic International—concluded that, overall, NASA's E&PO efforts have generally suffered from a lack of effective coordination.

(File size: 5.1 MB)



[American Perception of Space Exploration](#)

In 2004, in concert with the Center for Cultural Studies and Analysis, Harmonics International prepared a white paper on what the American public knows and thinks about NASA. While the public knows very little about what precisely NASA does – including Earth science in particular – the public generally has a very positive view of NASA, which carries over from success of the Mercury and Apollo missions. Interestingly, the data show that the public supports NASA's role in "advancing knowledge" and "increasing understanding of Earth" ahead of "increasing understanding of the universe."

- esdepo.gsfc.nasa.gov/docs

Best practice example

Getting the user's attention

Keep the overview short: one or two sentences.
If you have more content, let them expand it.

[Tell me more...](#)

To complete this task:

1. Open the xyz window.
2. Type a country. example: Germany
3. Click **OK**.

Tip: Tips can include shortcuts, details, or best practices.

Related topics

[Creating seductive help links](#)

[Testing the user's knowledge](#)

[Providing options](#)

Formatting required fields

My Application

Create project

View projects

View schedule

Search

Create Project

Project Number:

Description:

Start Date:

Completion Date:

Requestor:

Priority:

Tasks:

Submit Project

Formatting required fields

Requestor: *

Requestor:

*

Requestor:

Requestor:

Requestor:

Providing examples

Requestor:
first and last name

Formatting error messages

Please provide the following information:

- Project Number
- Requestor



Please provide the following information:

- Project Number
- Requestor



Please provide the following information:

- Project Number
- Requestor

Labeling UA links

Completion Date:

[estimating tips](#)

Requestor:

[can I request a project?](#)

- Quick tip...
- How do I....
- Tell me more...
- Why we need this information...

Formatting error messages

My Application

Create project

View projects

View schedule

Search

Create Project

Project Number:

Description:

Start Date:

Completion Date:

[estimating tips](#)

Requestor:

first and last name

[can I request a project?](#)

Priority:

Tasks:

Submit Project



When should I create a new project?

You should create a new project for each billable task. Some clients will have multiple projects.

Should each team member use their own project?

Multiple team members can use the same project.

Notes

Leave the **Completion Date** blank if it is unknown.

[Add note](#)

Is this topic helpful? [Yes](#) [No](#)



Questions?

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