

# Deconstructing the Custom Help Model

The logo for 'The Web Help JumpStart Conference' features the text in a bold, white, sans-serif font. The words 'The Web Help' are stacked above 'JumpStart Conference'. The text is set against a dark blue background with a subtle, glowing light effect behind the letters.

**The Web Help  
JumpStart Conference**

**August 19-20<sup>th</sup>, Cambridge, MA**

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We will discuss how to:

- open context-sensitive Help in its own browser window
- size and position the Help window
- open context-sensitive Help in the application window
- select navigational elements
- select a Help technology and tool
- work with the development team

- Amy Schulz, Ariba Inc.
- Stewart Walker, Helpful Technology Pty Ltd

# Opening Context-sensitive Help in Its Own Window

## Pros

- Easier to implement
- Supported by tools
- Meets current user expectations
- Window can be sized and positioned

## Cons

- Confusing to novices
- Must "bring to front" when opening new topics

## Sample App

01/06/2002 You are logged in as: sss

[Home](#) [Tutorial](#) [Help](#)

- Create project
- View projects
- View schedule
- Search

### Create Project

Project Number:  ?

Description:

Start Date:

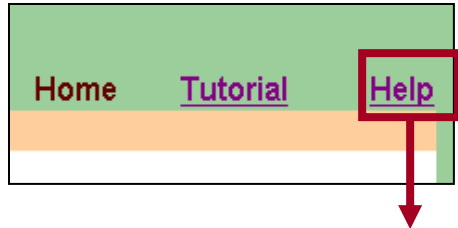
Completion Date:

Requestor:

Priority:

Tasks:

# Opening the Help Window



```
<a href="#" onClick="openHelp()">Help</a>
```



```
<script>  
function openHelp() {  
  helpWin = window.open('help.htm','helpwin',  
    'toolbar=0, location=0,directories=0,status=0,  
    menubar=0,scrollbars=1,resizable=1,width=600,  
    height=400');  
  setTimeout('helpWin.focus();',250);  
}  
</script>
```

# Bringing the Help Window to the Top

```
<script>
function openHelp() {
  helpWin =
    window.open('help.htm','helpwin','toolbar=0, ↵
    location=0,directories=0,status=0,menubar=0, ↵
    scrollbars=1,resizable=1,width=600,height=400');
  setTimeout('helpWin.focus();',250);
}
</script>
```

# Positioning the Help Window

The screenshot shows a web application interface with a green header and a brown sidebar. The main content area is titled "Create Project" and contains several form fields: "Project Number", "Description", "Start Date", "Completion Date", "Requestor", "Priority" (a dropdown menu with "1" selected), and "Tasks". A "Submit Project" button is located at the bottom of the form. A help window titled "Sample Help - Microsoft Internet Explorer" is overlaid on the right side of the page. The help window contains the text "Project Number" followed by a "Note: This number is sometimes automatically generated." A blue question mark icon is visible next to the "Project Number" field in the main application.



# Positioning the Help Window

```
<a href="javascript:help('fieldhelp.htm')"  
onMouseOver="getPos(event)">  
  
</a>
```

```
var x=y=0;  
function getPos(e) {  
  if (e != "") {  
    x = e.screenX;  
    y = e.screenY;  
  }  
}
```

# Positioning the Help Window

```
function help(helpurl) {  
  w = screen.availWidth; h = screen.availHeight;  
  if (w=='1024') {  
    w=970; h=775;  
  }  
  wintop = y+15;  
  winleft = x-15;  
  if (w - (x+550) < 0) winleft = w-525;  
  window.open(helpurl,"helpwin",'toolbar=0,location=0, ↵  
  directories=0,status=0,menubar=0,scrollbars=1,resizable=1, ↵  
  width=550,height=80,screenX=' + wintop + ',screen=' + ↵  
  winleft + ',top=' + wintop + ',left=' + winleft);  
}
```

# Sizing the Help Window Based on Its Content

The Web Help  
JumpStart Conference  
August 19-20<sup>th</sup>, Cambridge, MA

**Sample App** [Home](#) [Tutorial](#) [Help](#)

01/06/2002 You are logged in as: sss

**Create project** **Create Project**

**View projects** Project Number:  ?

**View schedule** Description:

**Search** Start Date:

Completion Date:

Requestor:

Priority:

Tasks:

**Sample Help - Microsoft Internet Explorer**

**Project Number**  
**Note:** This number is sometimes automatically generated.

# Sizing the Help Window Based on Its Content

```
<div id="content" style="position:relative">
```

```
... topic content ...
```

```
</div>
```

```
<script>
```

```
helpResize()
```

```
</script>
```

# Sizing the Help Window Based on Its Content

```
function helpResize() {  
    popUpHeight=((document.all["content"].innerText.  
length/200)*40+130);  
  
    // add space for images  
    if (document.images.length > 0) {  
        for (var i=0; i<document.images.length; i++)  
            popUpHeight = popUpHeight +  
                document.images[i].height;  
    }  
}
```

# Sizing the Help Window Based on Its Content

```
if (popUpHeight > 500) popUpHeight = 500;
window.resizeTo(550,popUpHeight);

// move window if it's off the screen (bottom or right)
if (opener.y+popUpHeight+25 >= screen.availHeight) {
if ((opener.wintop-popUpHeight-25) > 0)
window.moveTo(opener.winleft,opener.wintop-popUpHeight-
30);
else if ((opener.winleft+550+30) < 800)
window.moveTo(opener.winleft+30,0);
else window.moveTo(screen.availWidth-550,0);
}
window.focus();
}
```

# Opening Context-sensitive Help in the Application Window

## Pros

- Easier to use
- Easier to integrate into application development process

## Cons

- Can be difficult to implement
- Requires close coordination with development
- Often have small space to work with

## Types

- In-context tips and format examples
- Hover Help
- Left- versus right-side pane Help

## Considerations

- Space
- Modularity
- Navigational Elements



# In-context Tips and Format Examples

Service Guide E-Business Customer Service About UPS Site Guide

  
TRACK SHIP RATES TRANSIT TIME PICKUP DROP-OFF SUPPLIES

 LOG IN TO MY UPS.COM



## Drop-off Locator

Find the nearest locations to drop off your UPS packages by using your address, phone number, or place of interest.

We want to race the truck.  
People love the truck.™

### FIND LOCATIONS USING MY ADDRESS

Street Address or Intersection:   
(Example: "123 Elm Rd." or "Elm Rd. & Oak St.")

Postal Code:

City\*:

State\*:

(\*Required if no postal code.)

**OR**

### FIND LOCATIONS USING MY PHONE

Phone\*: (area code first)

\* Phone numbers (including cell phones) provide less precise location information. For best results, find locations by a complete address.

Welcome - Microsoft Internet Explorer

MySample.com

## View Stuff

To sort by a column, click on its heading. Click on an ID to view details about an item.

**About this Window**  
You can view and sort stuff stuff on this page.  
To review new stuff, sort by the effective column.  
[What is stuff?](#)

ID	Type	Status	XYZ	ABC	MFG	DIST	Effective	Termination	Close	LOD Req.
173	D	Real		PDQ Corp.	User First		01.Jul.1996	31.Dec.1999	31.Dec.1998	Y
174	D	Real		PDQ Corp.	Can't say.com		01.Apr.1998	31.Dec.2005	31.Dec.2001	N
175	R	Real		PDQ Corp.	who		01.Apr.1999	31.Mar.2005	31.Mar.2000	N
176	D	Real		PDQ Corp.	Inc Co.		01.Jun.1998	31.May.2001	31.May.2001	N
177	D	Toxic		PDQ Corp.	Them		01.Mar.1999	28.Feb.2004	28.Feb.2001	N
178	R	Imaginary		PDQ Corp.	Acme		01.Jul.1998	30.Jun.2002		N
179	D	Edible		PDQ Corp.	Us		01.Nov.1997	31.Oct.2000	01.Nov.1998	N
180	R	Real		PDQ Corp.	A Company		01.Jul.1997	30.Jun.2002	30.Jun.1998	N

**Status**  
Specifies whether the stuff is real, imaginary, edible, or toxic.

The screenshot shows the Alamo website interface. At the top, the Alamo logo is centered. Below it is a navigation bar with links: membership, about alamo, business travel, programs, travel tools, contact us, site map, and help. A secondary navigation bar contains: rates & reservations, locations, cars, and hot deals. The main content area is divided into two sections. On the left is a 'Helpful Information' pane with an orange border, containing text about the 'Country of Residence' requirement and instructions for non-US citizens. On the right is the 'tell us about your trip' form, which includes a dropdown menu for 'Country of Residence?' with a list of countries, a text field for a 3-letter airport code, and dropdown menus for 'Pickup Time' and 'Dropoff Time'. A footer note at the bottom of the form explains that the airport code field is optional and provides instructions on how to view help text.

## Alamo

membership | about alamo | business travel | programs | travel tools | contact us | site map | help

rates & reservations | locations | cars | hot deals

### Helpful Information

Country of Residence 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.

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

### tell us about your trip \* Required Fields

Country of Residence? \*

(Select) (Select) United States Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua Argentina Armenia Aruba Australia Austria Azerbaijan Bahamas Bahrain Bangladesh

3-letter airport code (for example, Fort Lauderdale or Florida or United)

Pickup Time \* 9:00 AM

Dropoff Time \* 9:00 AM

Information is not required. If you have questions regarding what to enter, click in the field and read the text that appears to the left.

- TOC
- Index
- Search
- Site Map

- Users prefer a hierarchical (TOC) structure versus linear (browse) or network (links).
  
- Soderson, C. (1987). "An experimental study of structure for online information." In *Proceedings of the 34th International Technical Communication Conference*.
  
- Gordon, S., Gustavel, J., Moore, J., and Hankey, J. (1988). "The effects of hypertext on reader knowledge representation." In *Proceedings of the Human Factors Society 32nd Annual Meeting*, 296-300.

- Users prefer the index to the TOC.
- Nichols, M. C. (1996). "The role of display tools in implementing effective online help systems." Thesis at North Carolina State University.

# A Good Index Makes a BIG Difference

## One study found:

- 75% success rate if the term was in the index.
- 4% success rate if the term was not in the index.

- Yussen, S. R., Stright, A. D., and Payne, B. (1993). "Where is it? Searching for information in a college textbook." *Contemporary Educational Psychology*, 18, 240-257.

- Search is the most commonly used navigational tool.
- Should provide full-text search.
- Should explain Boolean searches for novices.



- Used by top-down learners
- Good alternative to a TOC

- HTML and XML
- JavaScript and VBScript
- ASP and JSP

- Cost
- Development technologies and tools
- Application database
- Context-sensitive Help
- Browsers supported
- Single Sourcing

- Adding Help to the application database
- Context-sensitive mapping
- File management and archiving

- Senior Technical Writer, Ariba Inc.
- BA in Creative Writing
- Demonstrating help for Ariba Buyer, a web-based application that automates the procurement process
- [aschulz@ariba.com](mailto:aschulz@ariba.com)

- HTML, authored in Dreamweaver
- Context-sensitive via Help button and links in embedded user assistance
- Opens in separate browser window
- We control window size, focus, features
- Navigation = TOC, index, search
- Engineers are our friends!

- Dreamweaver: a build script resets links
- Context-sensitive links and Inline Tips: ownership is more work than expected
- Window control: iterative process to get it wrong, then right
- Navigation: framesets for TOC
- Engineers: more like spouses!?

- Independent Consultant: Helpful Technology Pty Ltd, Melbourne, Australia
- Bachelor of Science (Physics), Graduate Certificate in Applied Science (Scientific and Technical Writing)
- Technical writer since 1987, Help author since 1994
- Demonstrating Help for a corporate Internet banking application
- [helpfulau@yahoo.com](mailto:helpfulau@yahoo.com)



# My usual weekly schedule...

Monday



Tuesday



Wednesday



Thursday



Friday



Saturday



Sunday



- Project background
- Help demo
  - Accessing Help from the application
  - Navigation
  - Searching
- Window management
- Tools and technologies
- Results so far

- One of the world's top 100 banks
- Corporate internet banking application
- 4 modules
- 80 windows
- Browsers: IE 5+ / Netscape 6+
- Minimum bandwidth: 56k modem
- 6 UI developers, 6 business analysts
- 1 Help architect/author (100 d)
- 1 Help ASP/JavaScript developer (35 d)

# Demo – Accessing Help 1

The screenshot shows a Microsoft Internet Explorer browser window titled "Sample Application - Microsoft Internet Explorer". The address bar contains the URL "http://user/HelpTest/sample\_home.asp". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The toolbar contains icons for "Back", "Forward", "Stop", "Refresh", "Home", "Search", "Favorites", "History", "Mail", "Print", "Edit", "Discuss", and "Real.com".

The main content area of the browser displays a web application titled "Sample App". At the top right of the application, there are three navigation links: "Home", "Tutorial", and "Help". The "Help" link is circled in red. Below the navigation links, the application shows the date "07/24/2002" and the user information "You are logged in as: Stewart Walker".

The application interface is divided into a left sidebar and a main content area. The sidebar contains the following links: "Create project", "View projects", "View schedule", and "Search". The main content area is titled "Create Project" and contains several form fields: "Project Number:" (text input), "Description:" (text area), "Start Date:" (text input), "Completion Date:" (text input), "Requestor:" (text input), "Priority:" (dropdown menu with "1" selected), and "Tasks:" (text area). A "Submit Project" button is located at the bottom of the form.

The status bar at the bottom of the browser window shows the text "javascript:displayHelp('ACCT\_Reporting','Balances and Transactions (Balances)');" and "Local intranet".

# Demo – Accessing Help 2

The screenshot shows a Microsoft Internet Explorer browser window with the address bar set to `http://user/HelpTest/sample_home.asp#`. The main content area displays the 'Sample App' interface, which includes a navigation menu on the left with options like 'Create project', 'View projects', 'View schedule', and 'Search'. The main form area contains fields for 'Project Number', 'Description', 'Start Date', 'Completion Date', 'Requestor', 'Priority' (set to 1), and 'Tasks', along with a 'Submit Project' button.

Overlaid on the right side of the browser is a 'GOLD Help' window titled 'GOLD Help -- Web Page Dialog'. The help window shows the URL 'corpbank.com' and a search bar. The current help topic is 'Balances and Transactions (Balances tab)', which explains that the tab shows end-of-day balances and provides links to 'Help topics' and 'Frequently asked questions'. The 'Help topics' section includes links for 'Export displayed balances', 'Find particular accounts or balance records', 'Sort the listed balance records', 'View additional details for an account', and 'View data from a different day'. The 'Frequently asked questions' section includes links for 'Can I view latest balances rather than close of business balances?', 'Can I view the balance history of an account?', and 'Why can't I see an account?'. The 'Key screen items' section includes links for 'Additional Account Details' and 'Total Debits and Credits'. At the bottom of the help window, there is a link for 'More help, training and support'.

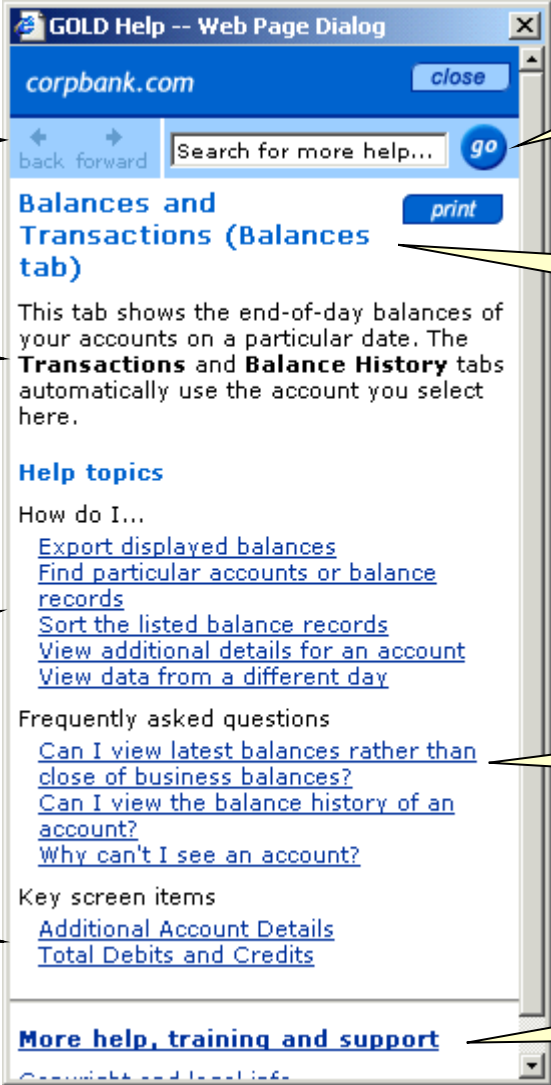
# Demo – Initial Help Page

Back/forward buttons

Brief description

Procedure links

Field Help links



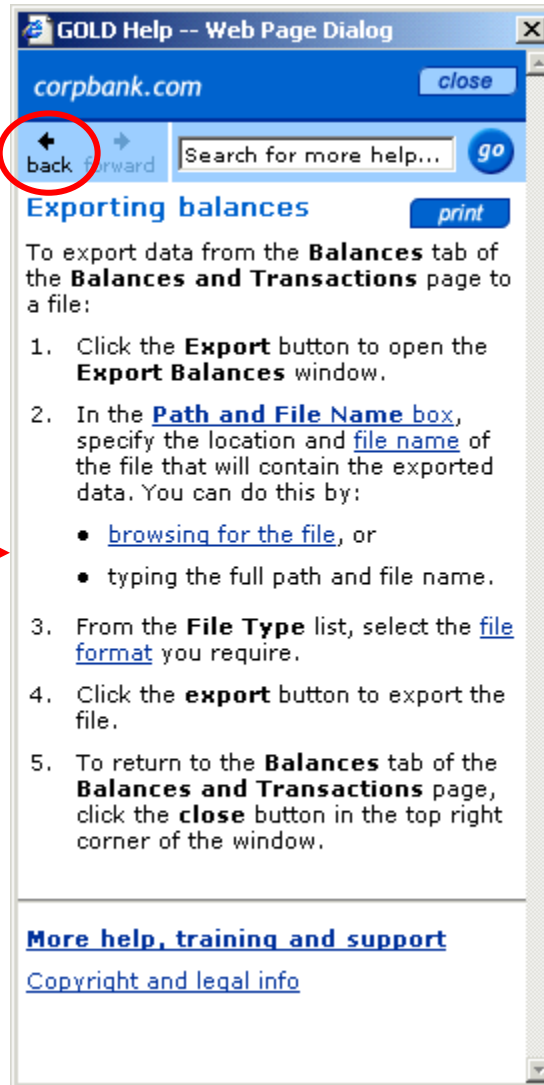
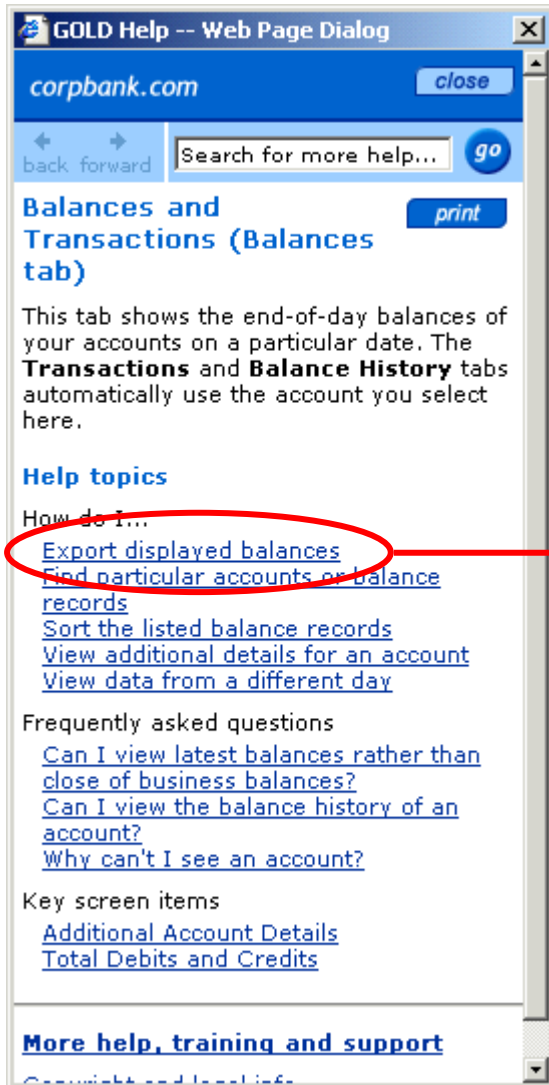
Search function

Screen title

FAQ links

Link to more Help

# Demo – Back/Forward Buttons



- Back button now enabled
- Cookie used to store navigation history

# Demo – Navigation (No TOC!)

GOLD Help -- Web Page Dialog  
corpbank.com

Search for more help... go

## Balances and Transactions (Balances tab)

This tab shows the end-of-day balances of your accounts on a particular date. The **Transactions** and **Balance History** tabs automatically use the account you select here.

### Help topics

How do I...

- [Export displayed balances](#)
- [Find particular accounts or balance records](#)
- [Sort the listed balance records](#)
- [View additional details for an account](#)
- [View data from a different day](#)

Frequently asked questions

- [Can I view latest balances rather than close of business balances?](#)
- [Can I view the balance history of an account?](#)
- [Why can't I see an account?](#)

Key screen items

- [Additional Account Details](#)
- [Total Debits and Credits](#)

**More help, training and support**

GOLD Help -- Web Page Dialog  
corpbank.com

Search for more help... go

## online@corpbank help, training and support

Haven't found the answer you want yet? Try one of the following items, or search for what you want.

- [How do I...](#)  
Step-by-step instructions for tasks
- Frequently asked questions**  
Answers to common questions
- [Quick overviews](#)  
Brief explanations of key concepts
- [Training](#)  
Online tutorials, training courses and more
- [Upgrading from Corpbank OnLine](#)  
Information to help you move smoothly from Corpbank OnLine
- [Glossary](#)  
Definitions of terms and abbreviations
- [Help Desk](#)  
Telephone and email contacts for the Help Desk

GOLD Help -- Web Page Dialog  
corpbank.com

Search for more help... go

## Frequently Asked Questions

The information you're looking for might be among the answers to the following Frequently Asked Questions (FAQs):

### Top 5

- [How do I check the status of a direct payment?](#)
- [How do I create a direct payment or template?](#)
- [How do I import information from files into direct payments?](#)
- [What are product permissions and how do I define them?](#)
- [How do I reset passwords that have expired or been forgotten?](#)

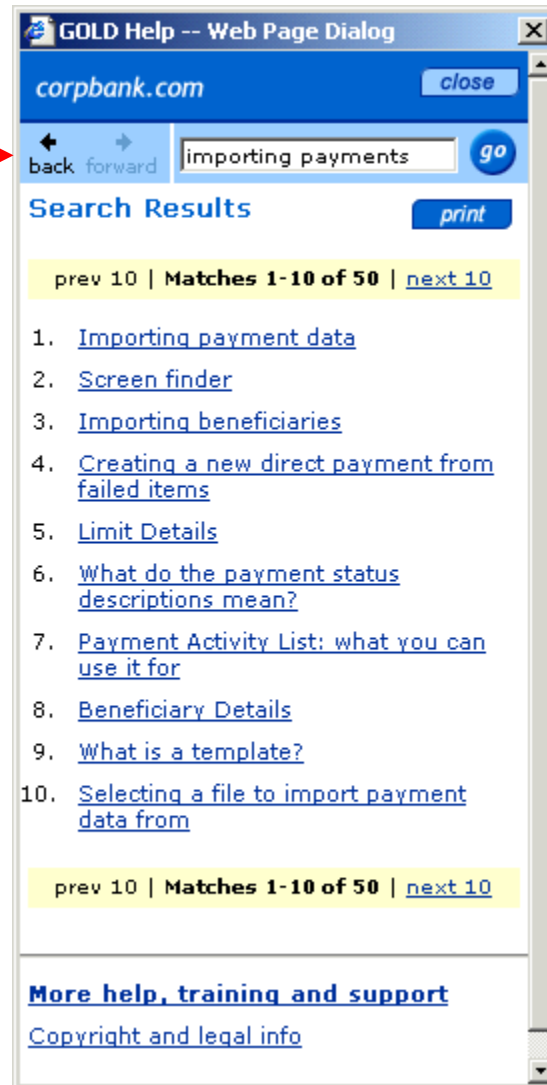
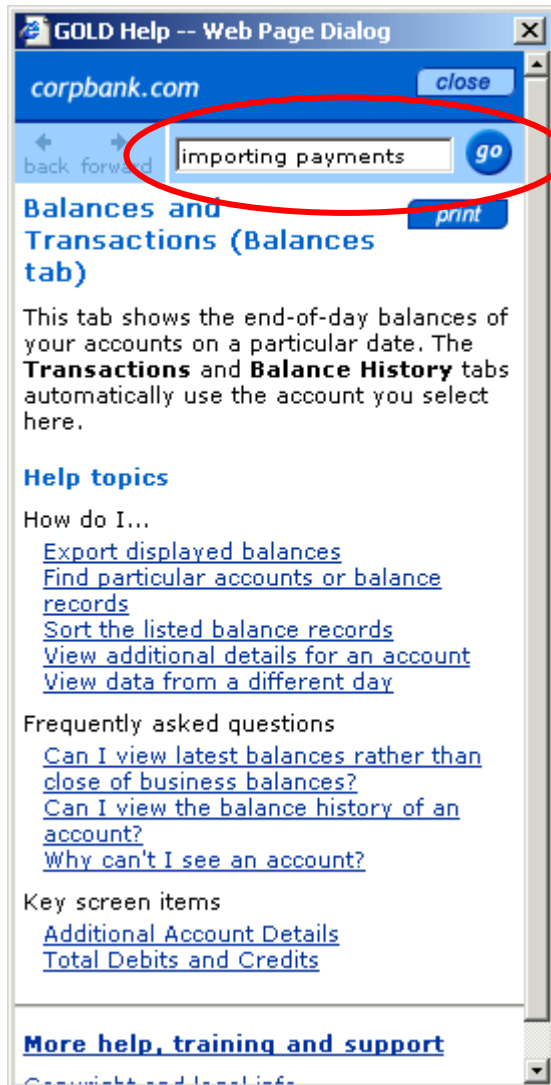
### More FAQs

Click the following links to see FAQs on the following subjects:

- [Account Reporting](#)
- [Administration](#)
- [Direct Payments](#)
- [Payments - General](#)
- [Real Time Balances](#)



# Demo – Search (No index!)



- Available from all Help pages
- Windows 2000 Index Server
- Custom ASP coding needed
- Deployment can be tricky
- Searches logged for reporting
- No index – keywords in each page's meta tags

- Embedded Help vs separate window
  - Initial design had embedded Help
  - Changed to separate window due to download speed concerns
- Keeping the Help window on top:
  - Open as **modeless dialog** in IE
  - Use Netscape-only `window.open` parameters **dependent** and **alwaysRaised**
- Most difficult part of the project!

## Code

```
window.showModelessDialog(helpURL,  
window,"help:0;resizable:1;dialogLeft:525px;  
dialogTop:30px;scroll:0;dialogWidth:275px;  
dialogHeight:543px;status:0")
```

## Reference

<http://msdn.microsoft.com/workshop/author/dhtml/reference/methods/showmodelessdialog.asp>

## Code

```
window.open(helpURL,"OnlineHelpWindow",  
"outerWidth='272px',outerHeight='542px',  
resizable=1,scrollbars=1,dependent=1,  
alwaysRaised=1,screenX='528px',  
screenY='30px' ")
```

## Reference

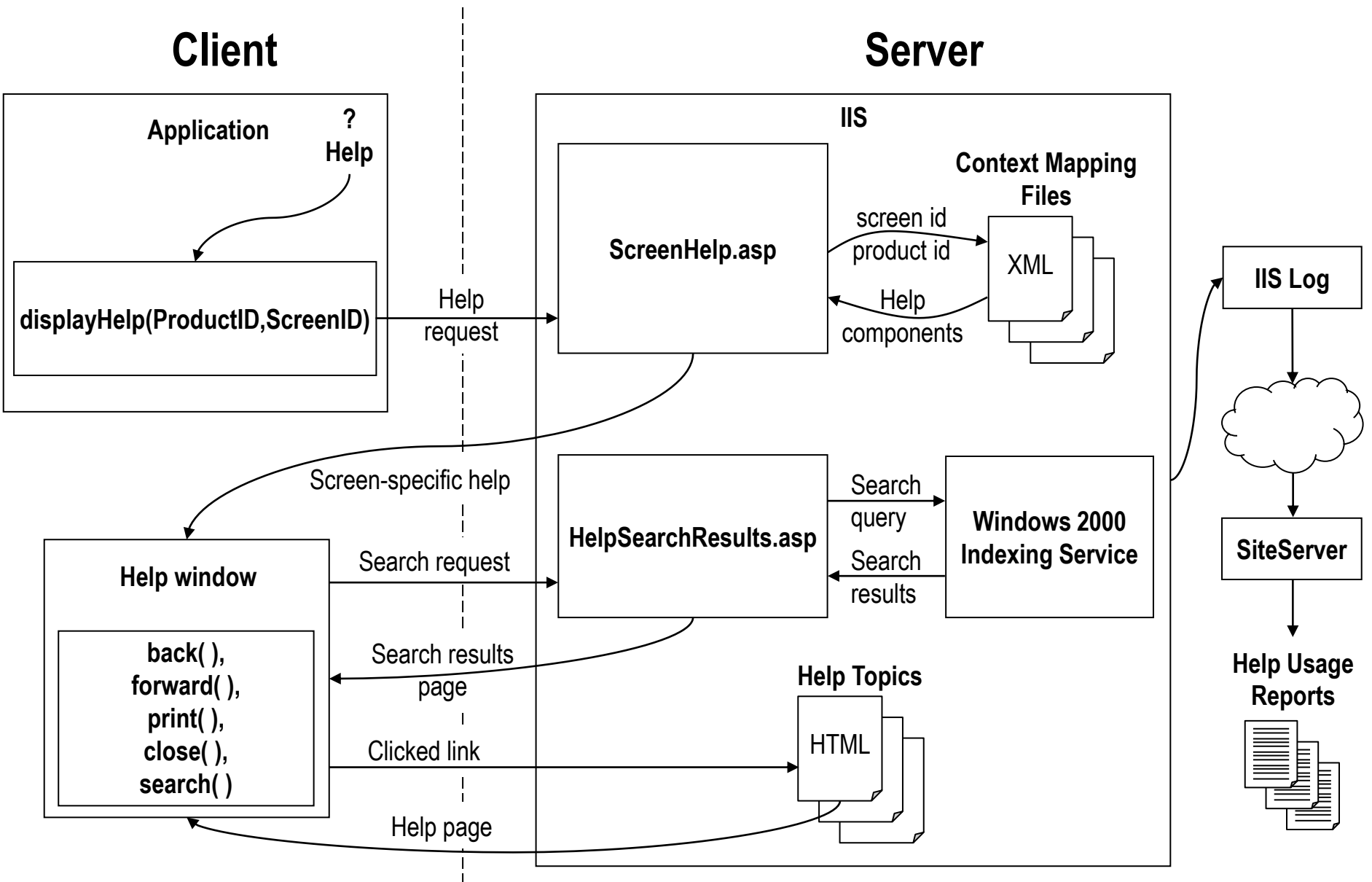
<http://developer.netscape.com/docs/manuals/communicator/jsguide/methods.htm>

- Links from modeless dialogs spawn new windows
  - Solution: wrap content in a frame
- New help request while Help window is open
  - Solution: re-use Help window and add new topic to current history
- Help window closes when user navigates to a different app page
  - Is this a problem?
  - Solution: Re-open Help from new app page

- **Authoring Tools**
  - FrontPage 2000
  - Paint Shop Pro
- **Development Tools**
  - Visual Interdev
  - Visual Basic (for building mapping tool)
- **Mapping Tool**
  - HAMSTER (Help to Application Mapping Structure Editor) – custom VB app

- HTML + CSS
- XML (context mapping files)
- Active Server Pages
- JavaScript/DHTML
- Cookies (back/forward navigation)
- Windows 2000 Indexing Service
- IIS 5 (web server platform)
- SiteServer (Help usage reports)

# Help System Architecture





- No field results due to software project being cancelled
- Excellent feedback from usability testing
- Client very happy

- Help in its own window
- Help in the application window
- Selecting a Help technology and tool
- Working with the development team