Guided Help: A Revolution for Software Help and Support?

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What we’ll cover in this session

- What do I mean by Guided Help?
- “Traditional” demonstration and eLearning applications
- The limitations of these applications
- Guided Help technologies
  - Microsoft Guided Help
  - Gteko GTAgent and GTSolve
  - Rocket Software’s ActiveGuide
  - Solan Technologies eTracker
- An alternative: Training Card Help
What do I mean by Guided Help?

- Help that leads users through a real task using the real/normal application UI, adding the following:
  - Highlighting of controls
  - Captions with step-by-step instructions and additional information
  - Error-trapping
  - Optional automation
- Guided Help is not:
  - A Flash-based simulation
  - A Wizard

My first experience of Guided Help

- 1986: creating computer-based training for Digital’s ALL-IN-1 office automation suite
- Menu options:
  - CM (Create Mail)
  - ED (Edit Document)
  - TR (Training)
- TR option launched script that displayed instructional content and requested user input
- Correct input was passed to the application
ALL-IN-1 computer-based training

Normal Operation

User \[\rightarrow\] ALL-IN-1 application

Training Mode

Training Script

User \[\rightarrow\] ALL-IN-1 application

- Displays Instructions
- Traps errors
- Provides Feedback

"Traditional" software demonstration and eLearning applications

- Adobe Captivate
- MIMIC
- ViewletBuilder
- TechSmith Camtasia Studio
- DemoWorks

...and others
“Traditional” software demonstration and eLearning applications

- Simulate the application
- Record task either as key screens or full-motion video
- Play back task as either:
  - full-motion video (demonstration) or
  - interactive screen images (training simulation)
- Uses Flash or other video playback technology
- Usually viewed in a browser

Pros and cons of simulation

<table>
<thead>
<tr>
<th>Potential Advantages</th>
<th>Potential Disadvantages</th>
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<tr>
<td>Does not require the application to be available</td>
<td>Users can’t actually complete real tasks as they learn</td>
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<tr>
<td>Provides &quot;safe&quot; environment for training and practice</td>
<td>Training simulations are restricted to predefined set of &quot;correct&quot; actions</td>
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<tr>
<td>Enables tasks to be performed &quot;out of context&quot;</td>
<td>Localisation requires the task to be re-recorded with the localised application</td>
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Microsoft Guided Help

- Available through Help in Windows Vista (online only) – one of CNET’s top 5 things I love about Windows Vista
- Can be downloaded from some Microsoft Knowledge Base articles (see http://tinyurl.com/oey82)
- Authoring tools available only to Microsoft and OEMs
- Relies on good accessibility in application code – uses Microsoft® Active Accessibility (MSAA)

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Microsoft Guided Help

- Two modes:
  - Do it automatically (why wouldn’t you?)
  - Show me step-by-step

  “Show me” mode is not a Wizard because it uses the normal UI (with superimposed captions and highlights)

Demonstration

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So why did Microsoft remove it from Vista?

- Maintenance and test costs:
  - Every Windows Update required Guided Help topics to be retested and potentially updated
- Security:
  - In the past 3 years there have been 5 critical-level security bulletins relating to HTML Help and its ActiveX control
  - Guided Help topics are just as powerful and represent a potential future security threat

Other examples of Guided Help

Two main areas:

- PC fault diagnosis and automated support
- Electronic Performance Support Systems (EPSS)
Support or Help?

- Many Guided Help solutions are targeted at the Support sector
- Automated support can result in great savings for large OEMs and ISVs
- Guided Help simulates an expert taking control of your PC
- Too helpful to be considered Help?
- Is there an artificial barrier between Help and Support?

Gteko

- “Networking and support software for the digital home”
- Making complex PC technology easier for home users
- Major customers: HP, Dell, Canon, NEC
- Acquired by Microsoft in November 2006
- Key Guided Help technologies:
  - GTAgent
  - GTSolve
Where you can see Gteko technologies in action

- PCPal – a free downloadable tool that runs checks and fixes on your PC
- Branded OEM support systems (such as DELL Support)

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PCPal – Automatic Fix

Demonstration

PCPal – Auto Fix

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DELL Support

Provides regular step-by-step instructions as an alternative to the Auto Fix.

DELL Support

The Auto Fix has been completed successfully. Click 'Finish' to close.

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DELL Support – beneath the surface

Rocket Software’s ActiveGuide

- Targeted at EPSS market
- Aim is to reduce/eliminate documentation through “smarter” applications
- Enables you to create interactive or do-it-for-me Help
- Runs client-side JavaScript to overlay additional UI components on a Web-based application
- Doesn’t touch the code on the server
- GUI-based authoring tool (no JavaScript skills required)
- ActiveGuide dialogs contain standard HTML and can potentially be edited by users
ActiveGuide demonstration

Form 1099R

Annual Distribution

2003

ActiveGuide Counsel

1. Select Distribution

2a. Taxable Amount

2b. Taxable amount or non-distributable

2c. Total distribution

3. Capital gains in non-dividend

4. Employee contributions or income taxes withheld

5. Net unrealized appreciation

6. Net unrealized appreciation in employee's account

7. The Scenario

Here you choose the level of support you would like for this tool. Your options are:
a. The Walk-Through gives you an animated preview of the steps in the task you choose.
b. The Guide coaches you through the task, giving you the directions you need at each step.
c. The E-Z Pass automates part of the task for you.

You'll be able to experience all three of them in this demo.

Click OK to display the choices.

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Authoring tool: ActiveGuide Studio
ActiveGuide issues

- You don’t need to be a programmer to create ActiveGuide content, but the level of technical skill is higher than required for a typical HAT
- Poorly coded applications may not be accessible to ActiveGuide
- Changes to the server-based application can cause problems for ActiveGuide

Solan Technologies

- Real-time on-line Navigation Guidance & Monitoring Tool
- Runs as a non-intrusive overlay for any application (including Web apps)
- Can run either in silent or active modes
- Can provide seamless guidance for tasks that involve multiple applications
- Monitors users’ performance
Choice of modes to suit the needs of novice through advanced users

Text caption overlays live application
Link to more information
Caption is continuously positioned correctly
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Solan Technologies

Authoring:
- No programming skills required
- Tasks are "recorded" and then captions and branching added
- A complex script can be created in 4 hours

A low-tech alternative:
Training Card Help

- Available with Microsoft HTML Help
- Two-way communication between application and Help
- Requires significant co-operation from application programmers
- See EC Software’s TNT Screen Capture for an interesting example

Demonstration

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# Conclusions

- Guided Help is potentially very powerful and effective
- However, there are significant maintenance and security issues – these have caused Microsoft to drop Guided Help from Vista
- Guided Help excels for critical troubleshooting and fix issues – can we use the same techniques in software user assistance?
- The technology exists and is becoming more widely available

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