Definition of Context-Sensitive Help (CSH)

- Ideally:
  Direct access to Help that is focused on the user’s current needs

- In practice:
  this means Help is based on the user’s current location, focus, and state within a software system
Why is CSH important?

- Research has shown that guidance with context is more effective than guidance without context *

  * Antonio Capobianco, LORIA, 2003

What we’ll look at today

- Established forms of CSH in Windows
- User-centred design goals
- The kind of information we should provide within CSH
- Possible CSH architectures
- Some guidelines on contextual Help
This session does not cover

- Map IDs, header files, APIs, and how to implement context-sensitive Help
- (Let the programmers worry about those issues!)

Established forms of CSH in Windows

- Keyboard shortcuts:
  - F1 displays Help on current window/dialog
  - Shift F1 – changes to What’s This? Help mode
- Windows 95:
  trend away from screen-based Help to only What’s This? Help
- 2000 onwards:
  trend away from What’s This? Help to only screen-based Help
- Recent trend:
  embedded/contextual Help
Dialog Help trends: Windows 3.1

Capturing Images From the Screen
The Screen Capture Function lets you copy all or part of your computer screen into Paint Shop Pro. Images captured from the screen are commonly called "screen snaps".

Example
All of the pictures of Paint Shop Pro's features that appear in this help file were created using the Screen Capture Function.

Creating Screen Captures
You have to setup the Screen Capture Function before you use it.
- Setting Up a Screen Capture
- Performing a Screen Capture

Dialog Help trends: Windows 95

Lists the available desktop themes. A desktop theme determines the overall appearance of your desktop by providing a predefined set of icons, fonts, colors, menu positions, sounds, background picture, screen saver, and other window elements.

If you modify a predefined theme by changing any individual feature of the theme, it automatically becomes a custom theme.

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Dialog Help trends: Windows 2000

Dialog Help trends: MS Office 2007

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What do we mean by context in a software system?

- Window/screen/form/dialog?
- Tab within a dialog?
- Current field/control?
- Other settings such as zoom level?
- Previous history?
- User role?
- Connectivity of PC?

Traditional CSH topics

- Descriptive, not procedural

- Based on current screen/dialog
  - Overview of dialog including purpose
  - How to access dialog
    (only needed if CSH topic is available using other Help navigation methods)
  - Key concept(s)
  - Description of each/every field and control
  - Links to related procedures
### User-centred Design of Context-sensitive Help

#### Example: RoboHelp X5

**Font Sets dialog**

*To access this dialog: From the Format menu, select Font Sets.*

Use this dialog to view a list of all font sets in the current project, look up the fonts assigned to an existing font set, create a new font set, change an existing one, and remove font sets you do not need.

A font set is a collection of fonts (typefaces) that authors apply to topics either through style sheets or character and paragraph formatting. The purpose of the font set is to define the preferred (default) font that should be used to display the output on the end user’s system.

For example, you can create a font set that lists Verdana as the first font, and then lists Arial and Sans Serif as substitute fonts. If your end users do not have Verdana on their systems, then the viewer will attempt to use Arial and then Sans Serif.

- **Font Sets:** Lists all font sets that are currently in your project. After you click **New**, a new font set is added to the list and named “Untitled.” While this name is selected, type in a new name for your font set and press **ENTER**. Then click **Modify** and add the fonts you want to the font set.
- **New:** Creates a new font set for the project.
- **Modify:** Modifies an existing font set.
- **Delete:** Deletes a font set from the project.
- **Fonts Included:** Describes all fonts that belong to a highlighted font set.

### User-centred design

- **Users:**
  - typically do not consult Help ahead of time
  - are engaged in a task when they need assistance
  - will only use Help if there is “scent of information”
  - want to minimise interruption to the task

- **Goal:** Keep the user in the task flow
What to include in a CSH landing page?

- Reference information?
- Procedural instructions?
- Mix of both?
- Complex (unstructured)?
- How comprehensive?

Help = Answers to questions
- We need to know what the questions will be

Typical user questions when selecting CSH

- What is this screen for?
- What do I need to enter in this field?
- Why do I need to provide this information?
- What does xxx mean?
- How do I ...?
  (Perhaps less common than when user is searching Help or using the index)
Usual CSH Workflow

- **One to One or Many to One**
  - Application Control #1
  - Application Control #2
  - Application Control #3
  - Map #1
  - Map #2
  - Map #3
  - Help Topic A
  - Help Topic B

Potential CSH Workflow

- **One to Many**
  - (a keyword-based approach)
  - Application Control #1
  - Application Control #2
  - Application Control #3
  - Help Topic A
  - Help Topic B
  - Help Topic C
A possible CSH strategy

- The controls in this dialog box
- Custom animations in general
- How to make 1st level bullets reveal one by one
- How to create a default animation effect for all slides

A common strategy: Link to dialog overview (Canon PhotoRecord)

Related procedures
Another common strategy: Link to procedural info (Jasc Paint Shop Pro)

Do users really want procedures from CSH?

- Compare the CSH for MadCap Flare versions 3 and 4
- Information type was changed from reference to procedural, apparently in response to requests from customers
Example: Insert Table dialog

Question: Which of these options should I select?

Flare 3: Reference topic

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Flare 3: Reference topic expanded

Select whether you want to collapse the cell borders in the table. If you collapse the cell borders, the row and cell borders of a table are joined in a single border. If you do not collapse the cell borders, the row and cell borders of a table are detached.

Answer to question

Flare 4: same Insert Table dialog

Same Question: Which of these options should I select?

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Flare 4: Procedural topic

Inserting Tables Into Topics

A table can easily be inserted into a topic for various purposes, such as comparing elements or providing descriptions. When you insert a table, you can do the following:

- Add a table caption
- Associate a style with the table (to determine its look and feel)
- Set the width using AutoFit behaviors
- See a preview of the table

How to insert a table into a topic

1. Open a topic.
2. In the XML Editor, place your cursor in the topic where you want to add the table.
3. Select Table > Insert > Table. The Insert Table dialog opens.
4. Select the Basic tab and modify the options as necessary.

Table Size:
- **Number of columns**: Enter the number of columns for the table.

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Flare 4: Procedural topic – scroll to answer

- **Cell Border Collapse**: Select whether you want to collapse the cell borders in the table. If you collapse the cell borders, the row and cell borders of a table are joined in a single border. If you do not collapse the cell borders, the row and cell borders of a table are detached.

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User-centred Design of Context-sensitive Help

Link to broader procedural info (Captivate 4)

Design of link implies broadening of knowledge

User could not possibly require help on how to use this dialog

Help topic is not specifically designed for this CSH link

My own view on this issue

- CSH needs to provide quick and easy answers to mid-task questions
- These questions are often reference-based
  - “What is this?”
  - “What should I enter?”
  - “Which should I select?”
- I question whether procedural topics can be usefully re-used as CSH topics

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IBM’s Task support clusters

- Presented by Michael Hughes at WritersUA Conference in Portland, Oregon (March 2008)
- A micro-architecture for user assistance
- Emphasis on CSH as “front door” to Help

Strategy

1. Identify context sensitive links

2. Design a task-support cluster:
   - Self-contained group of topics that support a specific task
**Task Support Cluster**

- Entry point is normally “Keystone Concept” topic
- Entry point normally from app (CSH) but may be from TOC
- Breadcrumb and mini-TOC links (but no links to other clusters)

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**Keystone Concept**

- Provide critical conceptual information
  - Tips, examples, principles, insights
- Provide just enough support to get the user back on task
- Don’t answer questions that users will never have!
- Help the user to navigate to deeper, relevant Help
Example of Keystone Concept topic

How do we treat CSH as part of main Help?

- Searchable?
- Include in Index?
- Include in TOC?
  - If so, where?
  - Grouped with relevant task-based topics?
  - In special UI reference section?

- Perhaps it doesn’t really matter

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Contextual Help

- Additional information that supplements/supports the main UI
- Assistance that is displayed in a pop-up window or beside some key fields
- Answers common questions without requiring users to leave the application UI
- Favoured by web applications

Options for displaying contextual Help

- “Inline” Help
- Expanding/drop-down text
- Dedicated embedded window
- Pop-up window

“Help may in fact be a great example of an appropriate pop-up: the text should definitely be short and it is best to be able to see the help without changing or obscuring the original context”

Jakob Nielsen
User-centred Design of Context-sensitive Help

Inline Help example: MailWasher Pro

Inline Help: Guidelines from Sun

<table>
<thead>
<tr>
<th>Scope of the Inline Help</th>
<th>Recommended Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>An entire page of an application</td>
<td>One to three short sentences</td>
</tr>
<tr>
<td>A page section that is titled or otherwise visually separated</td>
<td>One short sentence</td>
</tr>
<tr>
<td>A single entry field</td>
<td>One short sentence or, preferably, one phrase</td>
</tr>
</tbody>
</table>

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Pop-up example: BBC

Pop-up example: Amazon
Contextual Help in desktop applications: Windows XP

Examples:
- open an .exe (shared file)
- http://www.example.com (Web site)

Help topic is not specifically designed to answer this question

Contextual Help in desktop applications: QuickBooks 2008

Help topic is not specifically designed to answer this question
Contextual Help in desktop applications: QuickBooks 2008

Help Entry point #1

Help Entry point #2

Help Entry point #3

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Help Entry point #1

Answers the question

Link to related procedure
Help Entry point #2

Answers the domain-based "question"

Help Entry point #3

Includes guidance on what to do after completing the dialog
Contextual Help in desktop applications: MadCap Flare 4

MadCap Software and Intuit – a common CSH strategy

<table>
<thead>
<tr>
<th>This control:</th>
<th>...displays this type of information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Help control</td>
<td>step-by-step instructions on the current task</td>
</tr>
<tr>
<td>Hyperlink beside individual field</td>
<td>answer to specific question</td>
</tr>
</tbody>
</table>
Only add contextual Help where it is needed

Layered Contextual Help: Linking to “Deeper” Help

- Contextual Help may not answer users’ specific questions
- Users may require:
  - More detailed information
  - Key concepts
  - Step-by-step instructions
- Optional links within contextual Help provide a solution
**Example: IBM Infopops**

- Help browser opens to selected topic
- List of related links stays in the left hand frame

**Example: Flare’s Quick Help**

- Output Options
  - Insert Mark of the Web (quickhelp)
  - Use lowercase filenames

If this option is enabled, the output will be generated with the Mark of the Web (MOTW). For more information, click the Help icon in this topic.
### Future possibilities: Procedural contextual Help

- Provides sequence in addition to description and explanation
- Two possible implementations:
  - Balloon Help
  - Guided Help

### Balloon Help in SnagIt 9.2

[Image of SnagIt 9.2 interface with balloon help]
Summary

- CSH may be the most frequent way that users access Help
- You should plan your CSH strategy and write dedicated CSH topics
- Focus on answering likely questions rather than documenting the application
- Procedural CSH is becoming popular
- Contextual Help with links to regular Help topics may be an effective strategy
- Work with UI developers on designing CSH access and contextual Help
- Guided Help may be an effective way of providing procedural assistance in context
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Questions?

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