New Trends in Online Help

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What we'll cover in this presentation

- Six new trends within the user assistance community
- The context and reasons for each of these trends
- Issues and challenges to consider
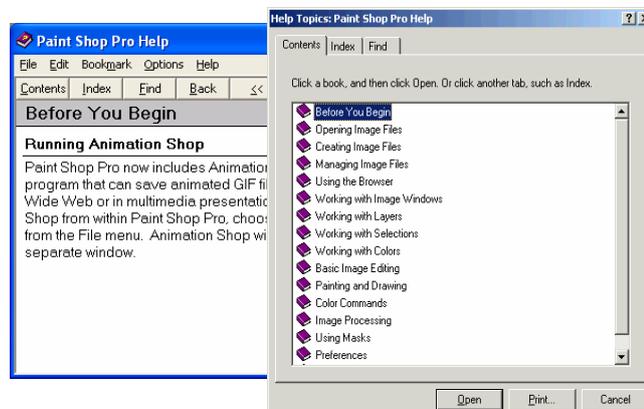- Advice on how to decide whether each trend is right for you

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Trend 1:
Tri-pane-based
to embedded

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Origins of the tri-pane model

- WinHelp 4 (Windows 95)
  - Separate windows for content and navigation
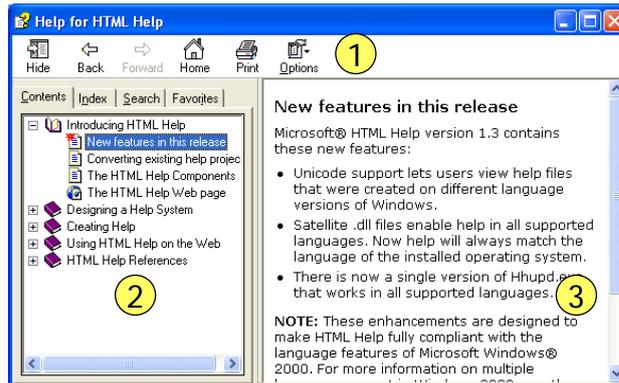

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Origins of the tri-pane model

- HTML Help 1.0 (Windows 98)
  - Navigation moved into left-hand pane within main Help window

1: Toolbar
2: Navigation pane
3: Content pane

The tri-pane gains momentum…

- All the following Help formats have adopted the tri-pane model:
  - WebHelp (eHelp, now Adobe)
  - WebWorks Help (Quadralay)
  - JavaHelp (Sun Microsystems)
  - Oracle Help for Java (Oracle)
  - Microsoft Help 2
  - FlashHelp (eHelp, now Adobe)
  - WinHelp 2000 (eHelp, now Adobe)

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Advantages of the tri-pane model

- Great for reference information
- Comfortable and familiar for author (and user?)
- Enables Help authors to work independently from software developers
- Many authoring tool options

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Disadvantage of the tri-pane model

- Help is a separate world that users have to choose to enter

Help

Application

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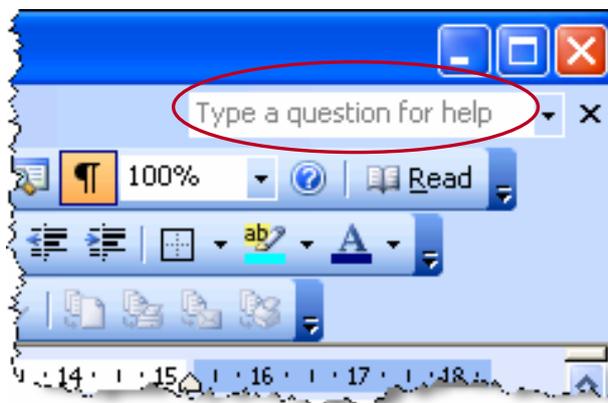
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So what's the solution?

- Break down the barrier between application (task) and Help
- Richer links:
  - From application to Help
  - From Help to application
- Help becomes part of the application UI

"Embedded User Assistance"

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Better access to Help:
Embedded links from application UI

- Search in Office 2003

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Links to procedural Help topics

Links to definitions
and explanations of terms

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Embedded user assistance content

- Static snippets of user assistance throughout the UI
- Dedicated user assistance pane

Notes

- Both of the above need to be designed in from the start
- A user assistance specialist must be involved in the UI design/creation process

User assistance as part of UI

Embedded user assistance – or simply part of the UI?

An alternative approach:
Balloon Help

- Help balloons overlaid on application
- "Proactive" – does not require the user to request Help
- If possible:
  adapts to user's experience and behaviour

Notes

- Less need for the Help author to be involved in the design of the UI
- However, make require significant planning and coding from developers

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Example of Balloon Help

Balloon may include link to tri-pane Help

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Trend 2: HTML-based to XML-based

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Reasons for trend towards XML-based publishing

- Increasing demand for single-sourcing and information re-use
- Availability of tools, technologies and standards – many of them free
  - Authoring tools
  - Transformation engines
  - DITA
  - DocBook
- Microsoft's new Vista Help technologies
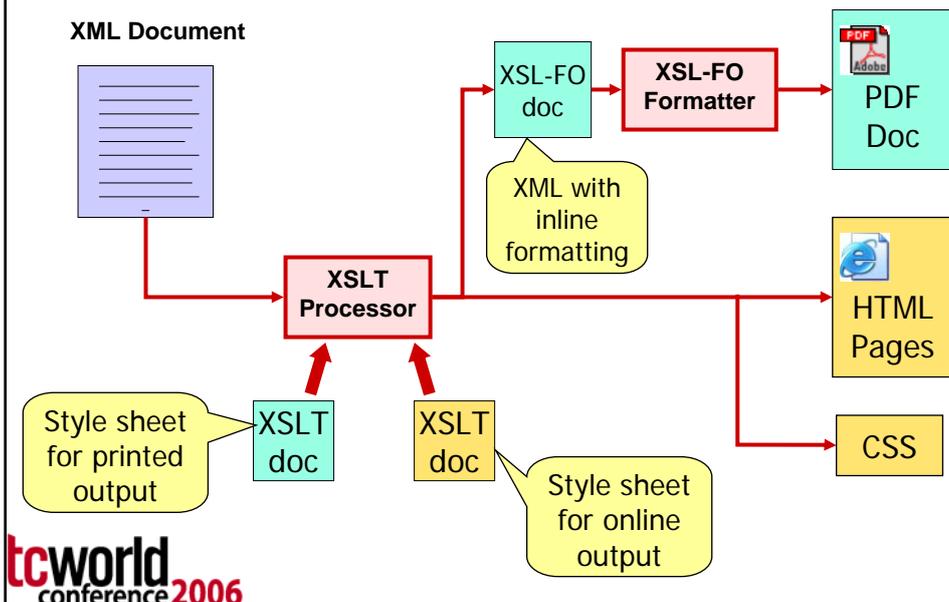
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Remember:
XML is not a display format

- XML is used for rich and semantic mark-up of source content
- Think of it as a way of storing information in a database
- For some authoring tools (such as Help & Manual or Flare) you need not be aware of the XML code
- XML is transformed (usually to HTML or PDF) for delivery to end-users

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XML Transformation process

XML Document

XSL-FO doc → **XSL-FO Formatter** → PDF Doc

XML with inline formatting

XSLT Processor → HTML Pages

Style sheet for printed output → XSLT doc

XSLT doc → Style sheet for online output

→ CSS

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Reasons to move to XML publishing

- Requirement for multiple deliverables from a single source
- Requirement to localize for multiple languages
- Desire to use open (non-proprietary) tools, technologies and standards

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Issues with XML

- Migrating to XML often requires a significant up-front investment
- Using your own custom Schema/DTD requires considerable XML and XSLT expertise
- XML-based Help authoring tools are less mature than HTML-based tools

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Trend 3:
Client-based
to server-based

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Typical characteristics
of server-based Help

- Single point of delivery
- Updated as needed
  (continuous publishing)
- Usage tracking and reporting
- Offline version installed to user's own
  hard disk (airplane Help)

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Case study: Microsoft Office 2003

- Microsoft's mantra:
  "Better when connected"

- when connected to the Internet:
  Help queries default to server-based content

- When not connected:
  Help queries are diverted to local CHM

- Server based content also available through Office Online website

- User feedback: "Content Watson"

Comparison of online and offline content
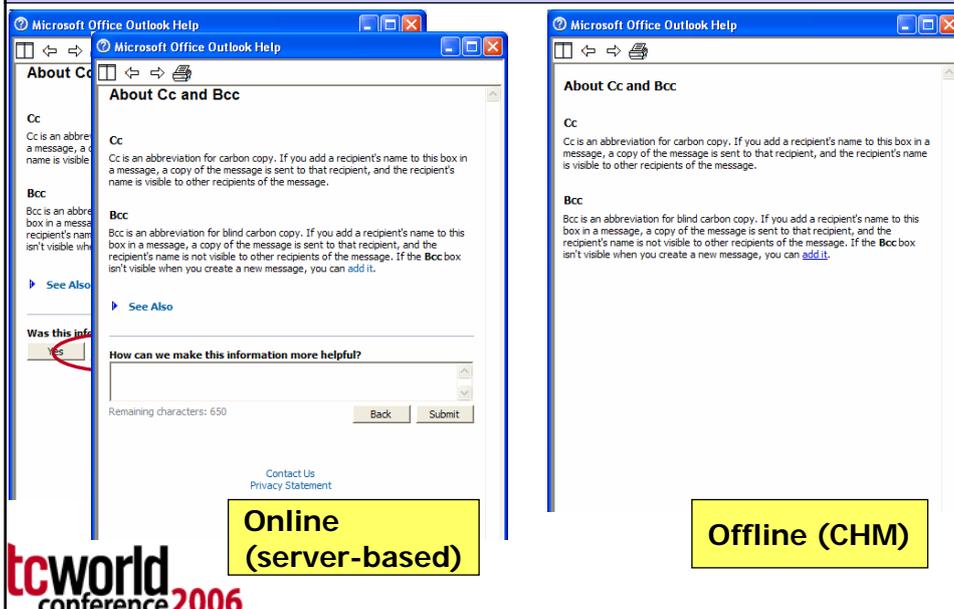
Online (server-based)

Offline (CHM)

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Office Online website
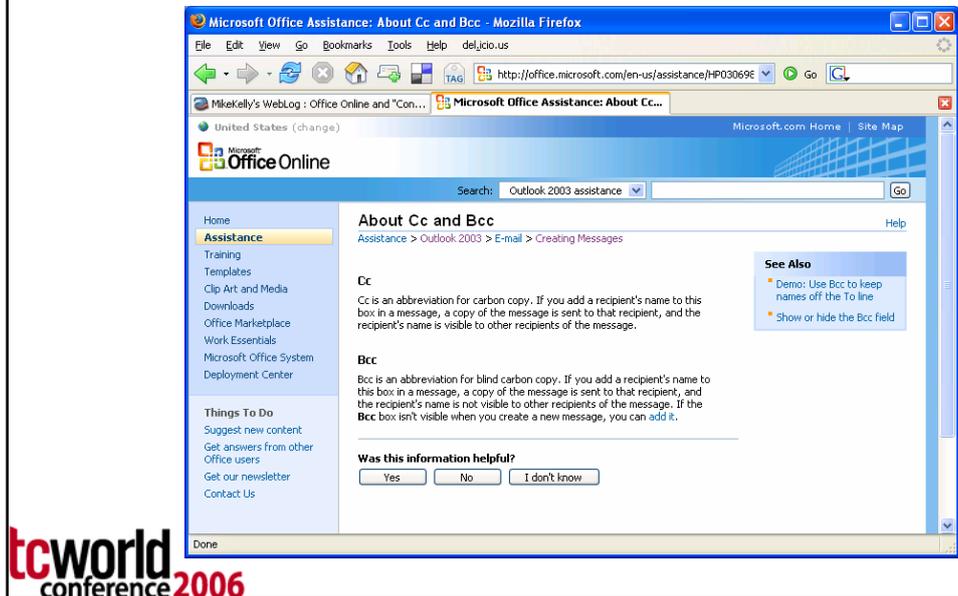
Content Watson

- An extension of "Crash Watson"
- Feedback stored in SQL Server database and tagged with an Asset ID
- Daily asset-level summaries
- Authors read comments and make changes
- Also:
  fine-tuning of search results is possible

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Trend 4: Increased competition for RoboHelp

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RoboHelp release history

- In 11 years from 1992 to 2003, 13 major versions:
    - 1 to 7
    - 2000
    - 9
    - 2002
    - X3 to X5
- In three years since 2003, no major new versions

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Since 2003…

- 2003:
  eHelp acquired by Macromedia
- 2004:
  Development of X6 well underway
- 2005 Q1:
  RoboHelp unofficially "sunset"
- 2005 Q4:
  Macromedia merged with Adobe
- 2006 (April):
  Adobe announces there will be a new version of RoboHelp in 2007
- 2006 (October)
  Beta program for RoboHelp X6 starts

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In the same period:

- MadCap Software forms and releases versions 1 and 2 of Flare (dubbed as an XML-based "RoboHelp replacement")
- Quadralay releases XML-based WebWorks ePublisher Pro
- EC Software releases XML-based Help and Manual v4
- ComponentOne releases Doc-to-Help Enterprise 2006 (with support for HTML source content)
- Innovasys releases XML-based HelpStudio 2

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RoboHelp's current strengths

- RoboHelp has many strengths, including:
    - Market share
      (*de facto* industry standard)
    - Stability and robustness
    - Ease of use for creating standard tri-pane Help
    - Indexing
    - Conditional text support
    - Headers and footers
    - Etc.

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RoboHelp's current key weaknesses

- WebHelp's cross-browser support
    - WebHelp pre-dates Win XP SP2, Firefox, Internet Explorer 7, and other recent browser releases
- Print output
    - Hyperlinks are not converted to cross-references
    - Limited control over page layout from within RoboHelp UI
    - Difficulties in controlling numbered and bulleted lists

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RoboHelp's current key weaknesses

- Limited possibilities for information re-use
  - Popups
  - Glossary Hotspot Wizard
- HTML source code
  - Kadov tags
  - HTML Help controls
  - No semantic mark-up

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Source code example

RoboHelp X5

```
<!--Metadata type="DesignerControl" startspan
<object CLASSID="clsid:A2F1FA63-C1E6-11d2-9140-
006DC83B9955" ID=SeeAlso BORDER=0 style="margin-top: 0px;
margin-bottom: 0px; margin-left: 0px; margin-right: 0px;
vertical-align: baseline;" align=bottom>
<param name="_Version" value="65536" >
<param name="_ExtentX" value="1508" >
<param name="_ExtentY" value="609" >
<param name="_StockProps" value="13" >
<param name="ForeColor" value="0" >
<param name="BackColor" value="14215660" >
<param name="UseButton" value="-1" >
<param name="UseText" value="0" >
<param name="ControlLabel" value="See Also" >
<param name="UseIcon" value="0" >
<param name="Items" value="Accounts$$**$$" >
<param name="Image" value="" >
<param name="FontInfo" value="Arial,8,0,," >
<param name="_CURRENTFILEPATH" value="C:\RoboHTML
Training\Locator\Welcome.htm" >
```

```
<param name="_ID" value="SeeAlso" >
<param name="DialogDisplay" value="1" >
<param name="Frame" value="" >
<param name="Window" value="" >
<param name="ChmFile" value="" >
<param name="DisableJump" value="0" >
</object>-->
<OBJECT
  CLASSID="clsid:ADB880A6-D8FF-11CF-9377-00AA003B7A11"
  ID="SeeAlso"  TYPE="application/x-oleobject">
  <PARAM  NAME="Command"  VALUE="ALink,MENU">
  <PARAM  NAME="Button"  VALUE="Text:See Also">
  <PARAM  NAME="Font"  VALUE="Arial,8,0,,">
  <PARAM  NAME="Frame"  VALUE="">
  <PARAM  NAME="Item1"  VALUE="">
  <PARAM  NAME="Item2"  VALUE="Accounts">
</OBJECT>

<!--Metadata type="DesignerControl" endspan-->
```

Doc-to-Help 2006

```
<BUTTON class=C1HGroupLink
d2hml="group=Accounts;displayin=menu">
See Also</BUTTON>
```

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Trend 5:
Single author to collaborative authoring

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Popularity of user forums and communities
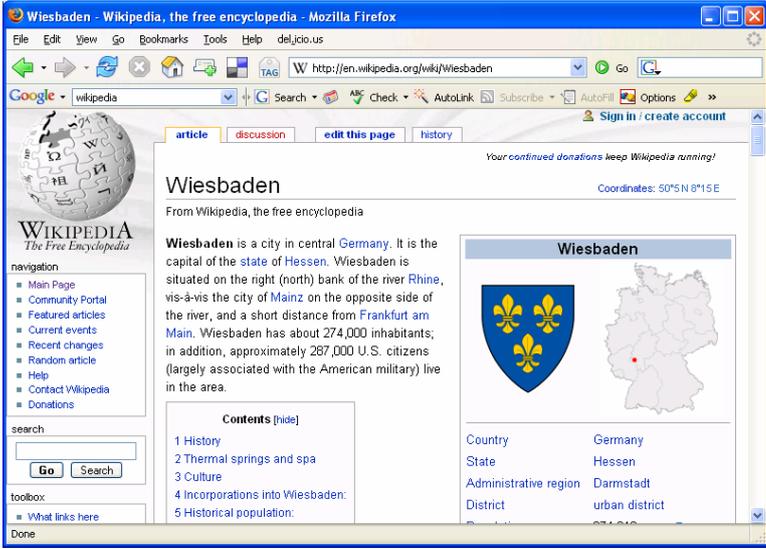

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Can we extent this principle to documentation and online Help?

- What if...
  - Readers "subscribed" to the text?
  - Readers reviewed the text?
  - Readers edited the text and corrected errors?
  - Readers collaboratively wrote the text?

- Possible using Wikis

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Example of a Wiki: Wikipedia

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Facts about Wikipedia

- 70 articles per hour added
- 3.8 million entries, 100 languages
- Budget of $800,000
- 1 employee (but 48,000 contributors)
- Shown to be almost as accurate and reliable as Encyclopaedia Britannica, and...
- Constantly revised and updated

Example 1 of Wiki for documentation

Example 2 of Wiki for documentation
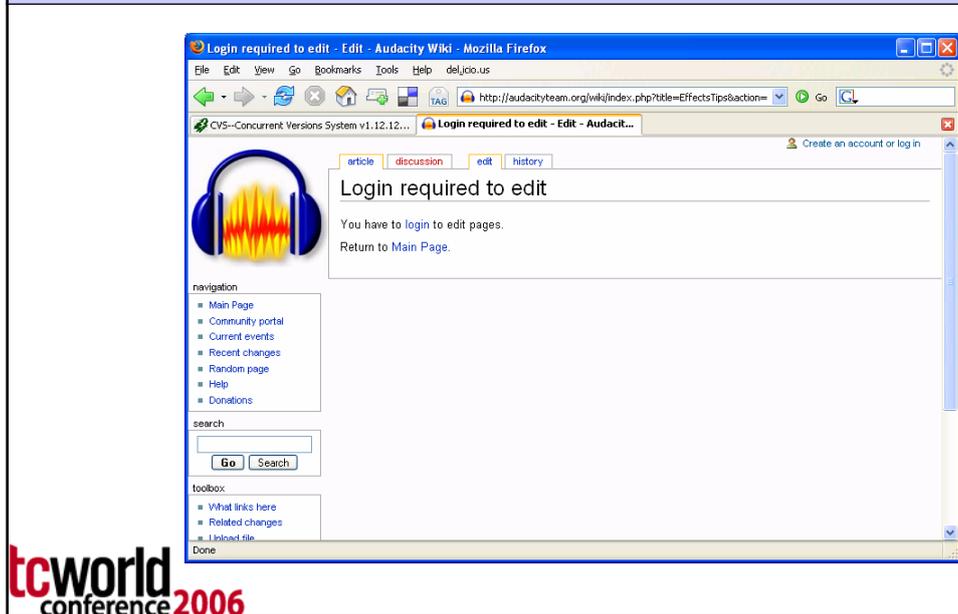
Wiki issues

- Content needs editing for consistency and flow
- Potential accuracy problem
- Accountability
- Safety/security issues
- Litigation
- Difficult to make context-sensitive

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Trend 6:
Multimedia and
"show me" demos

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Reasons for trend towards rich media

- Rise of broadband Internet access
- World-wide ubiquity of Flash Player (installed on 97.3% of Internet-enabled desktops)
- Maturity of simulation tools such as TechSmith's Camtasia and Adobe's Captivate

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Issues with simulation tools

- Simulations are high-maintenance
  - UI changes force re-recording
  - Localisation issues
- Users do no real work

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An alternative approach –
Guided Interaction

ActiveHelp UI overlaid on web application

2. Select Location(s) where you wish to search for sales by clicking inside the Location Search box, scrolling to see selections, and clicking on your choices.

For multiple selections, hold down the CTRL key (Macs use Command key) while clicking selections. Click OK when you're done.
OK

------- Select all --------
Alabama-Anniston
Alabama-Birmingham
Alabama-Mobile/Dothan
Alabama-Montgomery

Choose Job Category:
------- Select all --------
Accounting/Auditing
Administrative and Support Servic
Advertising/Marketing/Public Rela

Only this part of the application UI is active

Specialized Search
Admin|Support
Finance
Healthcare
Human Resources
Management
Public Service
Sales
Technology

College
Company Name
Contract|Temp
Diversity|Inclusion
Executive
High School Advice
Work Abroad

- Third-party tools (such as ActiveHelp) are becoming available

- Also: Active Content Wizard in Windows Vista

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Questions?

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