



# Don't Make Users Cry Help!

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WritersUA Conference

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# This presentation will cover:

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- What usability researchers are finding about how people use Help
- What researchers conclude are barriers to Help access
- The access point label barrier
- Usability testing methods to improve Help access

# Premise

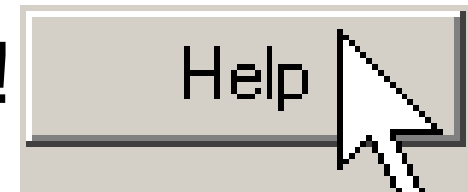


- Help access is a software user interface issue
  - Separate from Help structure and content

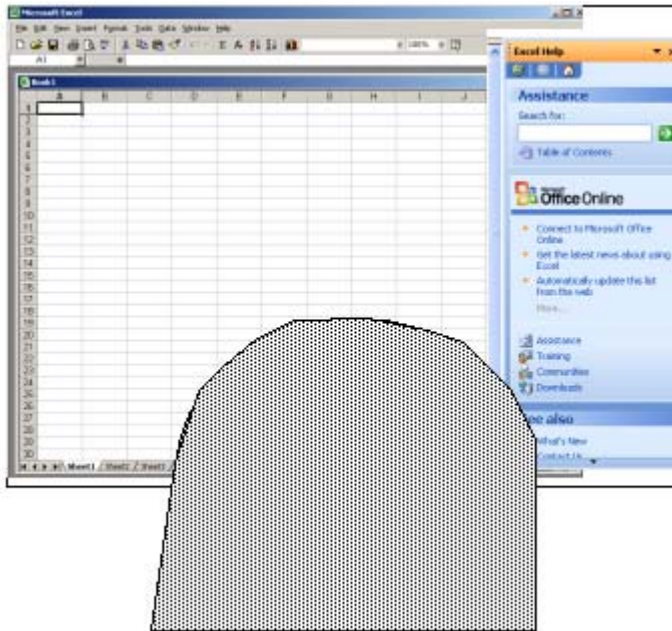
# Our vision about ideal use of Help



- I have no clue what to do...
- I think I'll look in the Help!
- Click!
- or...



Or...



- I have no clue what to do...
- Here's some information at the right!
- I'll read it now!

# What usability testing reveals...



- “I only go to Help as a **last resort**”
- “I’ve had **bad experiences** using Help”
- “I **never** use Help”

# Why don't users use Help?

- Two conference workshops addressed this question:

- CHI 2004



- UPA 2004



- HCI practitioners and researchers from Europe and North America
- Structured discussion identified:
  - Issues with Help access
  - Guidelines to address issues
  - Areas for further research

# Issue 1: Personas of Help users

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- Same as “user role” personas?
  - Not entirely...
- **4 “Help user” personas:**
  - Unaware that Help exists
  - Aware Help exists but don’t try it
  - Try help once or twice
  - Frequently or always use help



# Help personas—guidelines and future research

- Explore context of use to understand:
  - How to best serve “Always Try” personas
  - How to attract other personas to try Help
- Investigate return on investment in attracting other personas to Help

## Issue 2: Role of Help as descriptive support vs. functionality

Type of Help	Role as Descriptive Support	Role as Functionality
<b>Procedural</b>	Step-by-step text	Wizard or coach
<b>Domain info</b>	If supplementary or optional part of task	If critical to correct task performance

**Functionality elements** receive “top billing” in user interface design

# Help as part of product: guidelines

- Determine **who owns Help** and who **integrates** it
- Design functionality and Help support **together**
- Identify **goals of Help** along with goals of product, such as:
  - Accessing Help is blended with task, not an interruption
  - Design of access point matches the type of Help
  - Users can customize their access to Help information, such as adding links on the UI to Help topics

# Issue 3: Help access mechanisms

Mechanism	Examples	Issues
User initiated	Links/buttons to topics Direct hover Wizards	How to label?
System initiated	Embedded Help pane Inadvertent hover Coaches, Tip of the Day Messages	When to display?
Built into UI	Fixed hints or prompts	How much?

# Issue 4: Answering real user questions

- Real users
- Real questions
- To determine:
  - Content in UI itself
  - Content 1 click away
  - User terminology

# Identifying real user questions that Help should answer

- Mining of internal sources:
  - Customer support staff: call logs, chat files, emails
  - Search logs
  - “Did this topic answer your question?” feedback
  - Customized Help from large customers
  - Customer forums, training staff, training class observation, user wikipedia
- Collecting user data: usability testing, diary studies

# Issue 5: Help as part of customer assistance program

- Companion elements of program:
  - Human-assisted support via telephone, chat, and email
  - Website knowledge base
  - Product tutorials and training
- Users today more isolated, fend on own
- Elements should be integrated, cross-referenced



# **The Issue of Help Access Labeling**



# Commonly used labels

- Help
- ?
- F1
- FAQ
- Tip
- Info
- CMD - ?

*User initiated*

# The “Help” label barrier

- Connotation of initiating Help:
  - Asking for help (implied weakness)
  - Distress
  - Acknowledgment of state of “impasse” or “failure,” even if temporary
- Whereas the user may have just simply forgotten and needs a hint

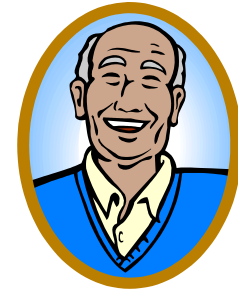
# Be wary of assumptions

- **“Visitors have been trained to seek ‘Help’ when things go wrong”**
  - *Defensive Design for the Web* (37signals, © 2004), Guideline 21, “Offer an easy-to-use ‘Help’ section and provide clear links to it.” page 118.
- **“The majority of users probably think of software help in terms of the content of separate help files reached via the F1 key or the Help menu and accessed through an index or by searching.”**
  - *Software for Use* (Constantine & Lockwood, ACM Press, © 1999), page 240.

# Who knows to click on “Help”?

People who:

- Remember “DOS”
- Know “WinHelp”
- Are “good users”  
...like us!



# What will I get if I click on Help?



- A ***firehose*** of information!
- Another “system” I have to learn
- I’m off task

# Symbols as access points



“I’ve got a **question.**”



“I need some **information.**”



“I need help entering a  
**function.**”

Requires noticing and **interpreting  
the symbol.**

# Traditional Help access steps

1. Experience information need
2. Make decision to access Help
3. Find where to access Help
4. Access Help
5. If context sensitive, does current topic address information need?
6. Yes – done  
No – keep looking (links on page, index)

# Improved ~~Traditional~~ Help access steps

1. Experience information need
- ~~2. Make decision to access Help~~
- ~~3. Find where to access Help~~
2. See label that invites Help access
3. If context sensitive, does current topic address information need?
4. Yes – done  
No – keep looking (links on page, index)



# Inviting Help access

- Step-by-step:
  - Instructions
  - How to
  - Tip
- Domain:
  - Learn more about...
- Negotiate for UI real estate for info “nuggets”

# Example: Legislative Information System (LIS) home Help label

The screenshot shows the LIS home page with a navigation bar at the top. The main content area is divided into several sections. A yellow box labeled "Can't Find It" points to the "CAN'T FIND IT?" tab in the navigation bar.

**Legislative Information System of the U.S. Congress** *congress.gov*

**Alert Service**  
FAQ  
Site Map

**THOMAS**  
GPO Access  
Contact Us

[Join LIS and CRS Mailing Lists](#)

**HOME**  
Bills, Amendments, Laws, Votes, Record

**SENATE**  
Members, Schedules, Committees, Rules

**HOUSE**  
Members, Schedules, Committees, Rules

**AGENCIES**  
CRS, CBO, GAO, LOC, Executive, Judicial

**MEDIA**  
News, Commercial Sources

**CAN'T FIND IT?**  
Contacts, Help, A-Z Index

**Bill/Amendment/Law # (108th)**  
 **SEARCH** **CLEAR**  
Examples: *hr5, s.4, sres50, sa21, PL108-5*

**Bills (93rd-108th)** [ACTION YESTERDAY](#)  
[Quick](#) • start here for most searches  
[Advanced](#) • more search options  
[Multi-Congress](#) • search across Congresses  
[Full Bill Text](#) • best for specific language in bills  
[Lists](#) • [Sponsors](#) [Committees](#) [Bill Titles](#) ...

**Committee Publications**  
[Reports](#) • search full text (104th-108th)  
[Lists](#) • [National Journal Markups](#) [CQ Coverage](#)  
[Committee Prints](#) [Senate/House Documents](#)  
[Hearings](#) [Senate Audio](#) ...

[How To Pick A Search Page](#) • [How To Use LIS](#)

**Votes (101st-108th)**  
Senate: [Recent + Archive](#) [This Session](#)  
House: [Recent](#) [Archive](#) [Search \(House only\)](#)

**Senate Amendments (108th)**  
[Pending & Proposed](#)

**Public Laws (93rd-108th)**  
[By Number](#) [From Archives](#) [U.S. Code](#)  
[Constitution Annotated](#)

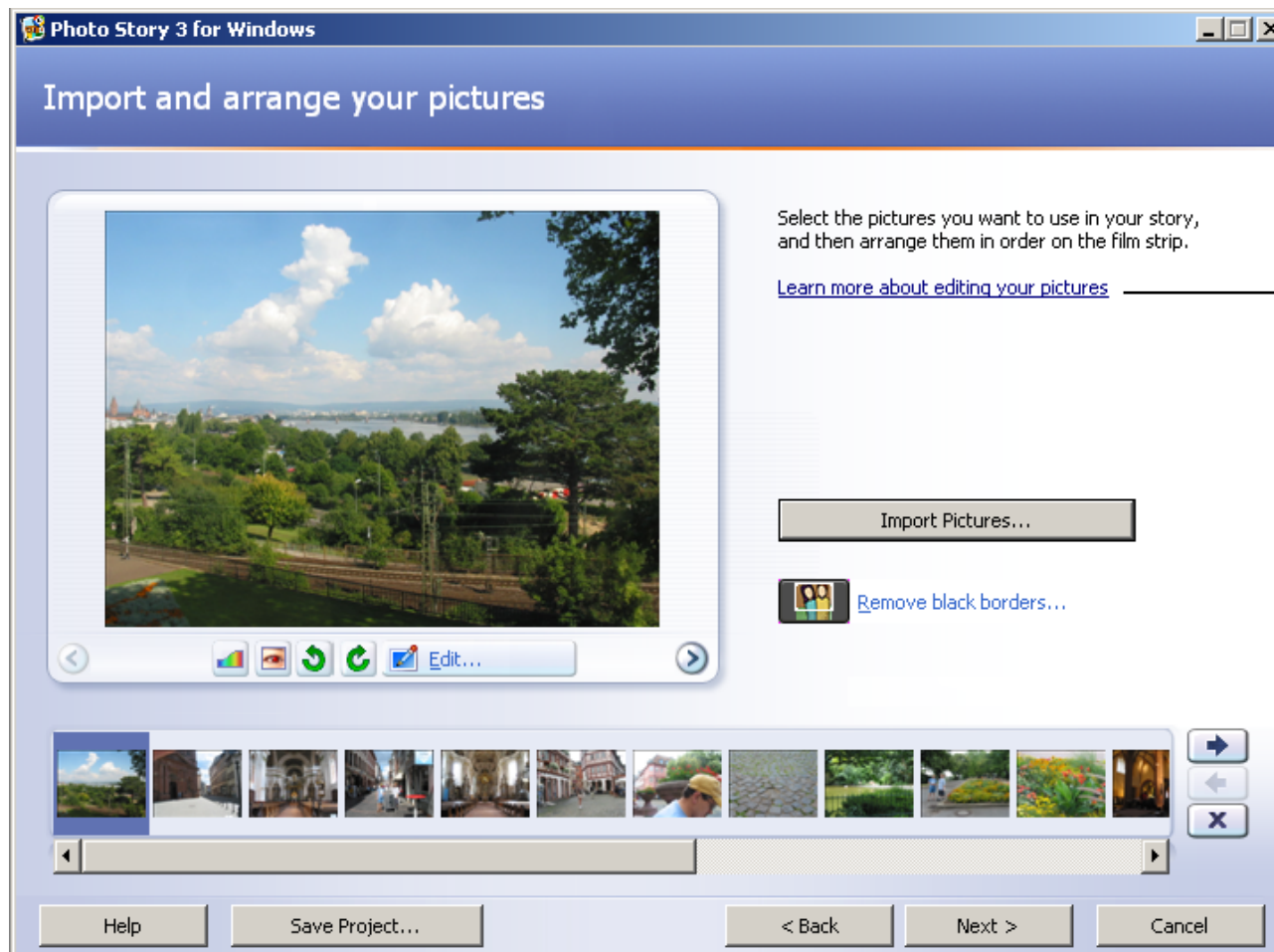
**Congressional Record (101st-108th)**  
[Quick](#) [Advanced](#) • search full text  
[Index](#) [Date/Subject](#)  
[Lists](#) • [Daily Digest](#)

**Quick Clicks**  
**Senate**  
[HomePage](#) [News Wire \(Senate only\)](#)  
Floor: [Now \(Senate only\)](#) [Schedules](#) [Video](#)  
Comm: [Schedules](#) [HomePages](#) [Audio](#)  
**House**  
[HomePage](#) [News Stand \(House only\)](#)  
Floor: [Now](#) [Schedules](#) [Video](#)  
Comm: [Schedules](#) [HomePages](#)  
**Appropriations** [FY2004 Consolidated](#)  
[Current Status](#) [Archive](#) [CRS Products](#)  
[Expiring Authorizations](#) [CBO Estimates](#)  
**Other Links**  
[Hot Bills List](#) [CRS](#) [Floor Agenda](#)  
[National Journal](#) [Cong. Quarterly](#)

[Privacy & Security Notices](#)

**"Can't Find It" instead of "Help" tab**

# Example: Microsoft Photostory



**Learn  
more**

# How to determine high-priority Help information

- 20% of information answers 80% of user's questions
- This information should be in UI content or one click away
- Conduct user research to identify this information
  - Progressive usability testing
  - Card sorting

# Progressive usability testing

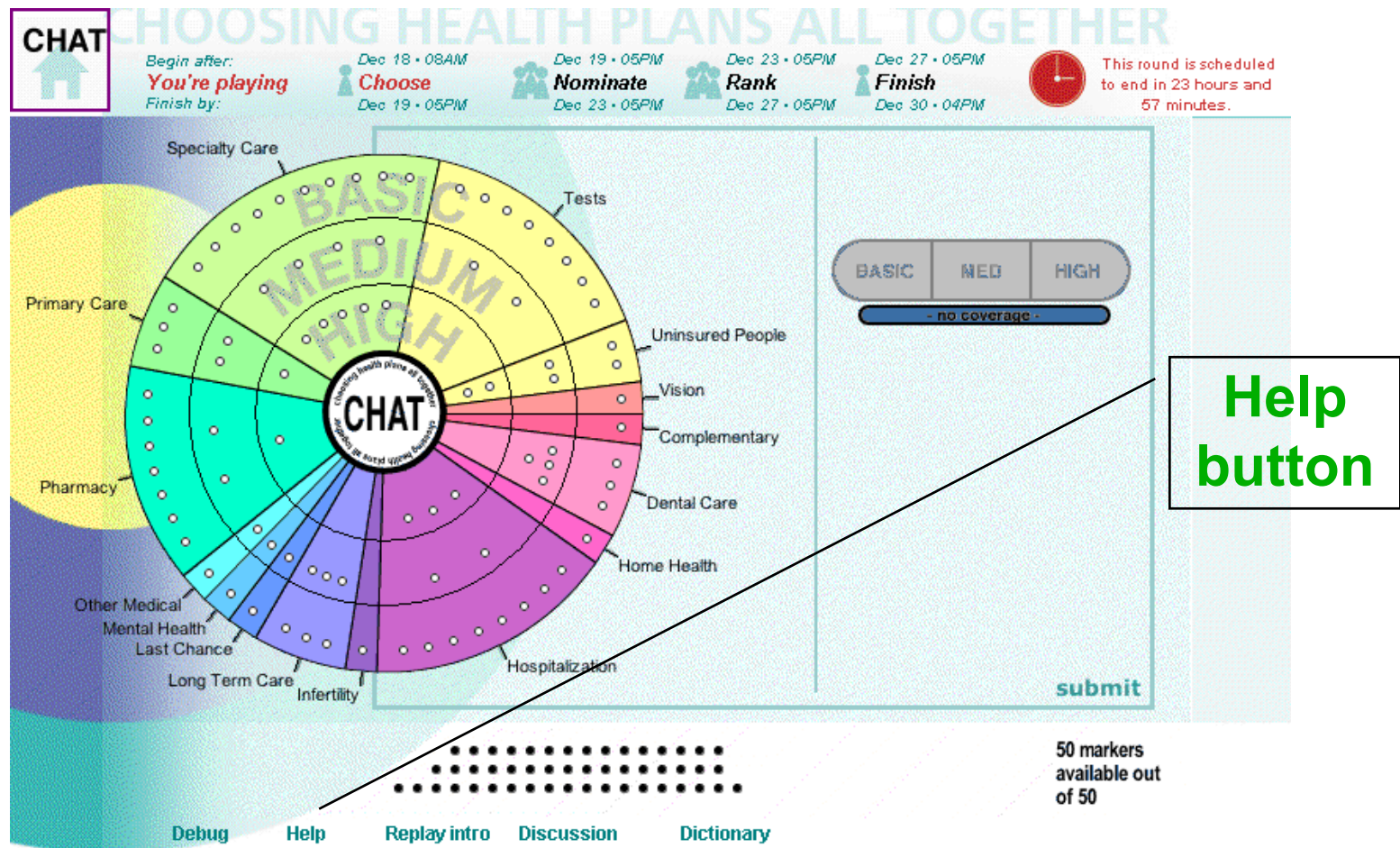
- Start with no information on UI
- Test with enough users to determine
  - First questions
  - Mission-critical questions
  - Terminology
- Change UI to provide quick access to first and mission-critical questions
- Test again

# Testing parameters

- 5 or 6 users per profile or role
- Don't say use of Help is part of task
- Hint progressively if user gets stuck:
  - Level 1: Generic (“what else might you do to...”)
  - Level 2: Specific (“There is something on the screen you might try...”)
  - Level 3: Directive (“Try [link]”)
- Keep track of hinting



# Example: Web application for choosing health insurance



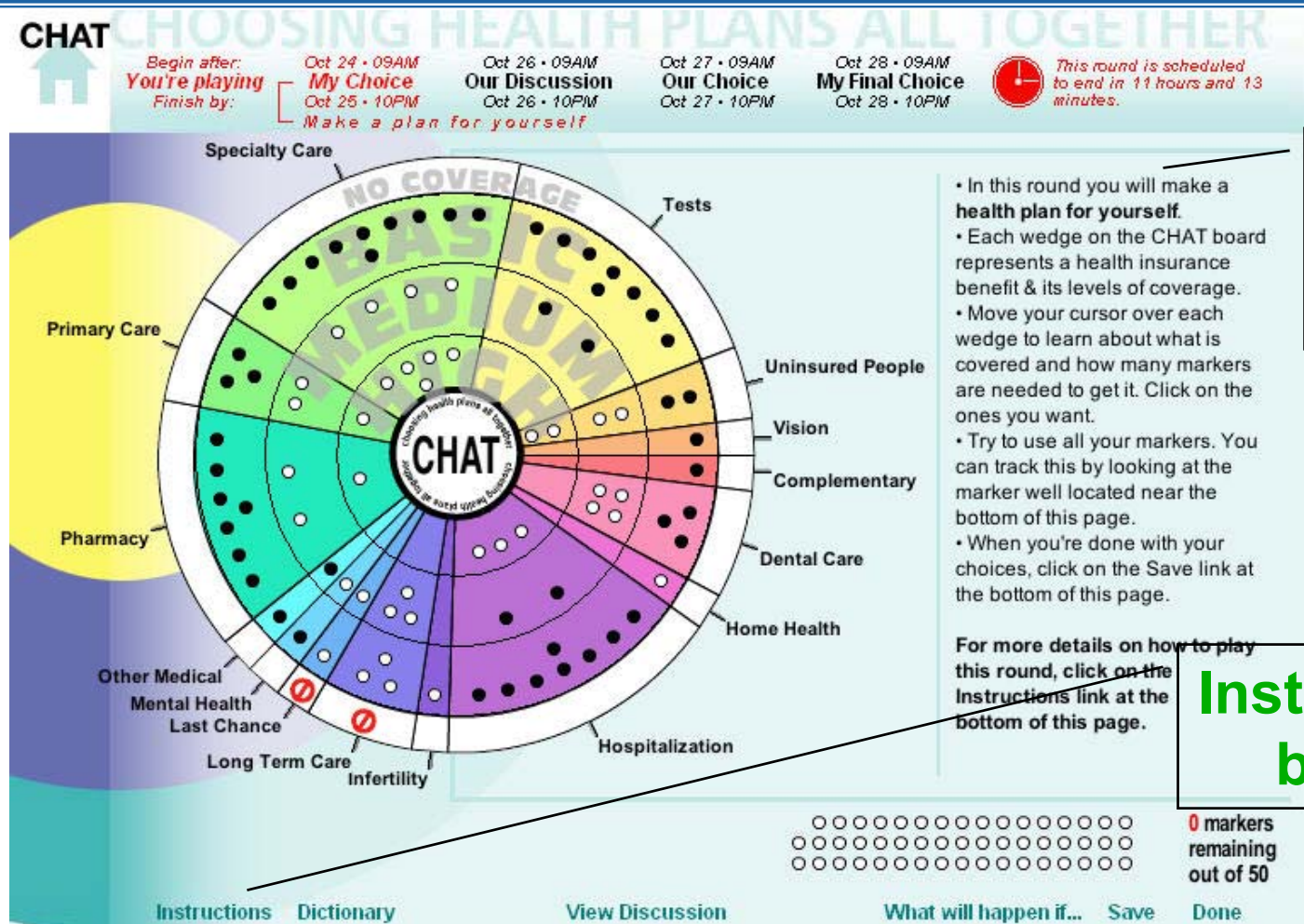
# Results of first usability test

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- Some users opened Help on own; most required hinting
- Help covered the board, making use difficult
  - After first try, most users kept it closed



# Next version



**On-  
screen  
text**

**Instructions  
button**

# Results of second usability test


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- All users read the on-screen text
- Few users opened Instructions
  - No hinting used
- Errors resulted from lack of specific information elements in on-screen text
- More screen real estate needed to add them

# Report of missing content

Vital information missing from Onscreen Instructions		
Round 1	Round 2	Round 3
<ul style="list-style-type: none"> <li>Levels of coverage and how choosing a higher level selects lower levels</li> <li>How to reduce coverage</li> <li>How to “place markers”</li> <li>Health events</li> <li>Assure user they can change any selections they make</li> <li>How to determine the number of markers required</li> </ul>	<ul style="list-style-type: none"> <li>“Try to use all the markers”</li> <li>Click on View Consensus</li> <li>“You will nominate additions and changes”</li> <li>Where the reason list is</li> </ul>	<ul style="list-style-type: none"> <li>How to change a coverage level</li> <li>What is different between Rounds 2 and 3</li> </ul>

# Final version



*Begin after:*  
**You're playing**

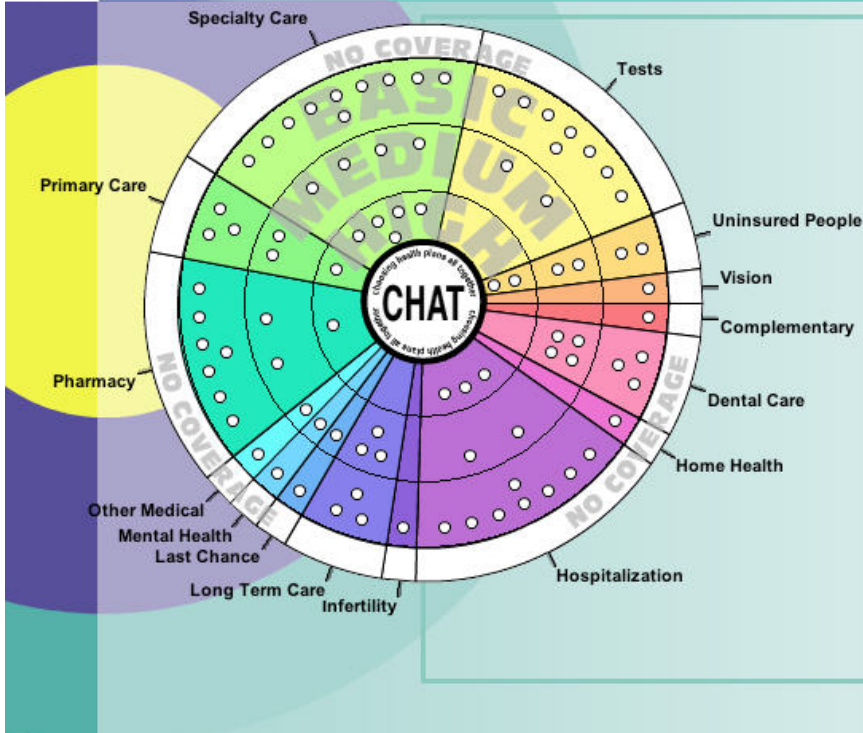
*Finish by:*

Sep 11 • 06:00PM  
**My Choice**  
Sep 14 • 12:00AM

Sep 14 • 08:00AM  
**Our Discussion**  
Sep 19 • 12:00AM

Sep 19 • 08:00AM  
**Our Choice**  
Sep 22 • 12:00AM

Sep 22 • 08:00AM  
**My Final Choice**  
Sep 24 • 12:00AM



- In this round you will make a health plan for yourself.
- Each wedge on the CHAT board represents a health insurance benefit and its levels of coverage.
- Move your cursor over each wedge to learn what is covered and how many markers are needed to get it.
- The marker well at the bottom of this page shows how many markers you have.
- To add a benefit to your plan, click on the level you want. Black markers appear on the level you picked and on any lower levels for that benefit.
- If you change your mind, just click on a different level.
- If you don't want a benefit, select the "no coverage" ring at the outer edge of the wedge.
- Try to use all your markers.
- When you're done, click on Save at the bottom of this page. You will then try some "health events" to see how your plan works.
- For more details on how to play this round, click on the Instructions link at the bottom of this page.

**50 markers**  
remaining  
out of 50

[Instructions](#)  
for My Choice round

[Dictionary](#)

[Change Password](#)

[View Discussion](#)  
2 new responses  
since last visit

[Save](#)

# Results of third usability test

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- Users did not open Instructions
- Users succeeded by using on-screen text
- Credit to application team for enlarging screen real estate to improve instructions

# Card sorting to collect user data about content labeling

- Create deck of cards with labels
- Ask each user to:
  - Group cards that are related
  - Create labels for groupings (or choose a card with the label)
  - Set aside cards with labels they do not understand



# Example



User's  
label for  
topics  
s/he  
grouped

# “Techniques and Help Facilities in Humane Interfaces”

“...An interface, as far as is possible, should be self-teaching...Help displays are simply part of the content. No special mechanisms or techniques are required to use them.”

—Jef Raskin, creator of Macintosh, 1943-2005

*The Humane Interface, Addison-Wesley,  
© 2000, page 175*