



Don't Make Users Cry Help!

WritersUA Conference

April 10, 2006

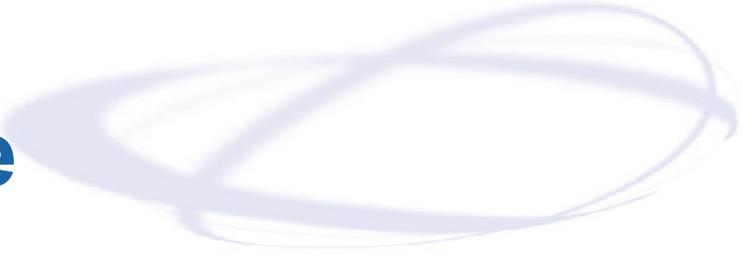
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This presentation will cover:

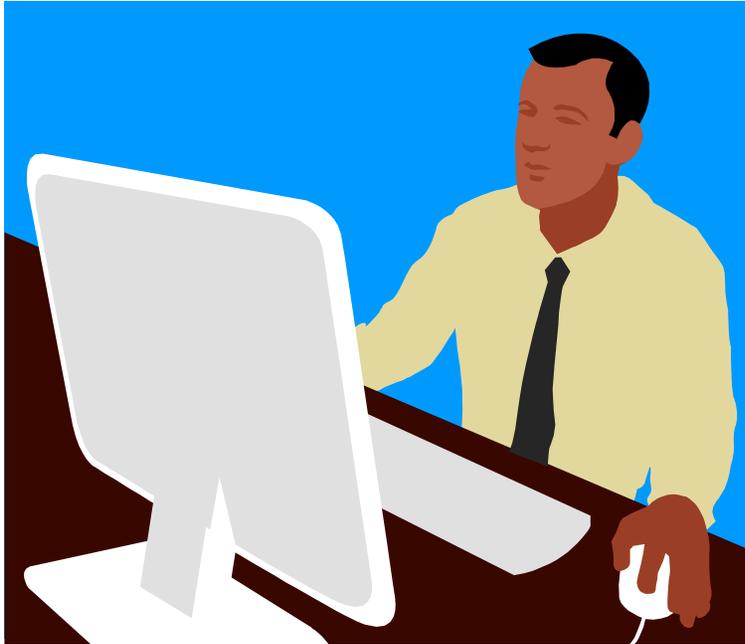
- What usability researchers are finding about how people use Help
- What researchers conclude are barriers to Help access
- The access point label barrier
- Usability testing methods to improve Help access

Premise



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

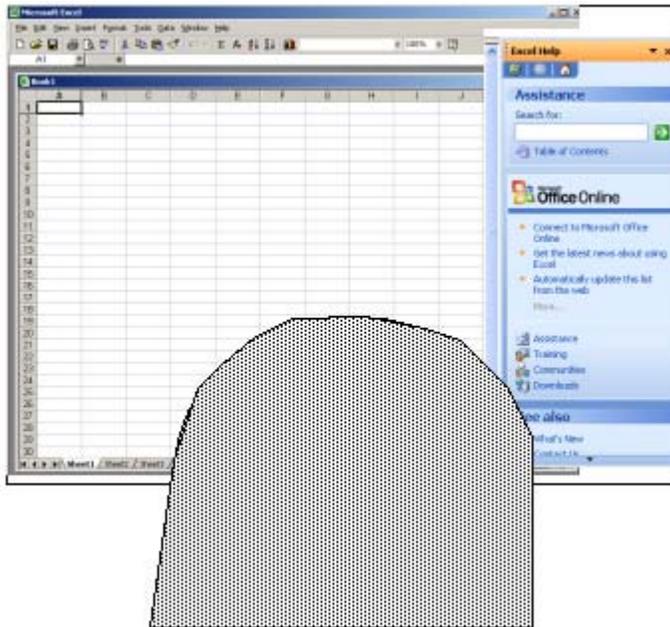
Our vision about ideal use of Help



- 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

- 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
Procedural	Step-by-step text	Wizard or coach
Domain info	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 'CAN'T FIND IT?' tab is highlighted in red and contains links for 'Contacts, Help, A-Z Index'. A green callout box with the text 'Can't Find It' instead of 'Help' tab points to this tab. Other navigation tabs include HOME, SENATE, HOUSE, AGENCIES, MEDIA, and CAN'T FIND IT?. The main content area includes a search box, various links for bills, amendments, and records, and a 'Quick Clicks' sidebar with links for Senate and House resources.

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)

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](#)

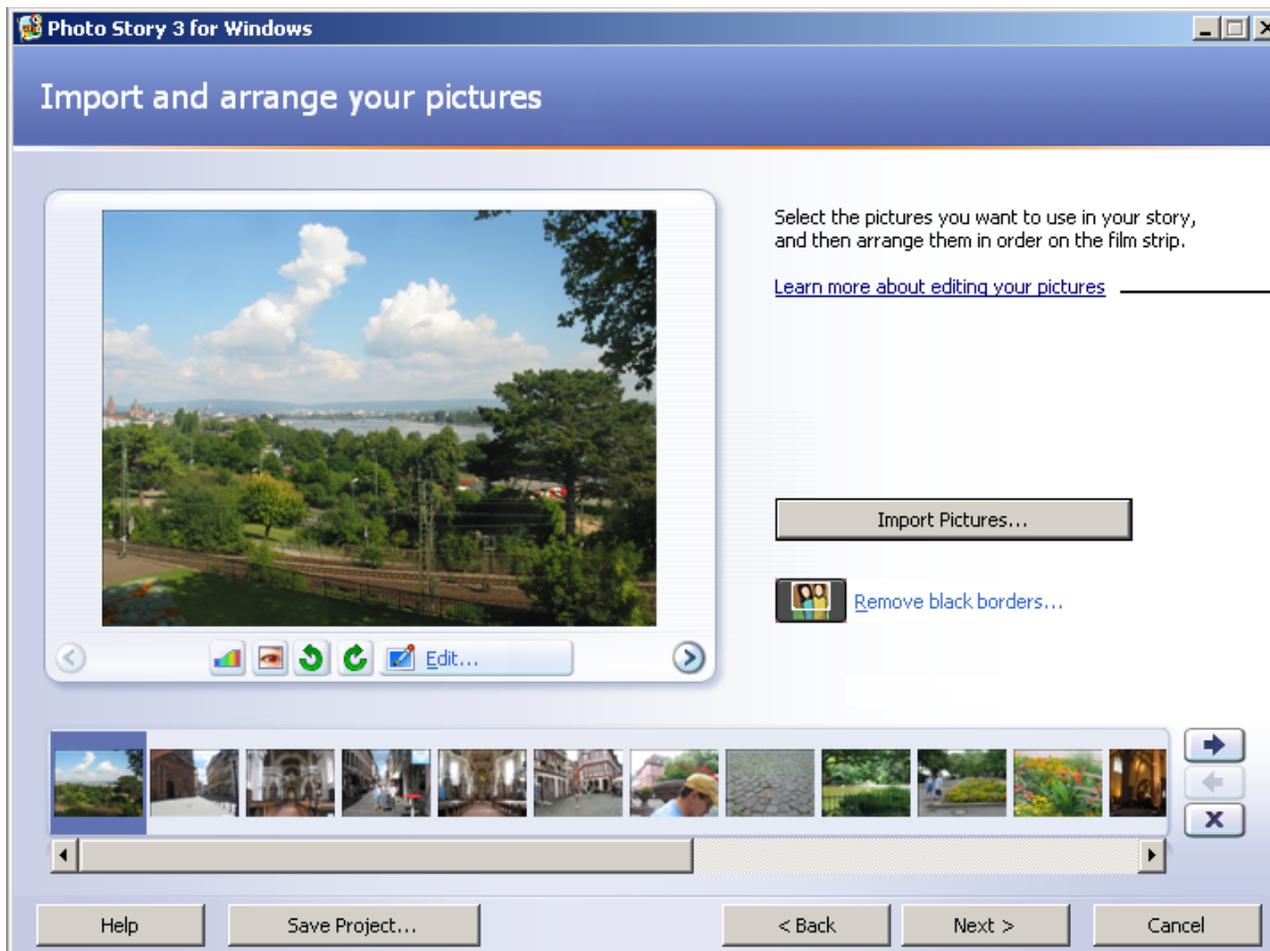
Appropriations [FY2004 Consolidated](#)
[Current Status](#) [Archive](#) [CRS Products](#)
[Expiring Authorizations](#) [CBO Estimates](#)

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

CHAT **CHOOSING HEALTH PLANS ALL TOGETHER**

Begin after: **You're playing** Finish by: **Choose** **Nominate** **Rank** **Finish**

Dec 18 • 08AM Dec 19 • 05PM Dec 19 • 05PM Dec 23 • 05PM Dec 23 • 05PM Dec 27 • 05PM Dec 27 • 05PM Dec 30 • 04PM

This round is scheduled to end in 23 hours and 57 minutes.

Specialty Care Tests Uninsured People Vision Complementary Dental Care Home Health Hospitalization Inertility Long Term Care Mental Health Last Chance Other Medical Pharmacy Primary Care

BASIC **MEDIUM** **HIGH**

- no coverage -

submit

50 markers available out of 50

Debug Help Replay intro Discussion Dictionary

Help button

Results of first usability test

- 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

CHAT **CHOOSING HEALTH PLANS ALL TOGETHER**

Begin after: **You're playing** Oct 24 • 09AM Oct 26 • 09AM Oct 27 • 09AM Oct 28 • 09AM
 Finish by: **My Choice** **Our Discussion** **Our Choice** **My Final Choice**
Oct 25 • 10PM Oct 26 • 10PM Oct 27 • 10PM Oct 28 • 10PM

Make a plan for yourself ⌚ This round is scheduled to end in 11 hours and 13 minutes.

- In this round you will make a **health plan for yourself**.
- Each wedge on the CHAT board represents a health insurance benefit & its levels of coverage.
- Move your cursor over each wedge to learn about what is covered and how many markers are needed to get it. Click on the ones you want.
- Try to use all your markers. You can track this by looking at the marker well located near the bottom of this page.
- When you're done with your choices, click on the Save link at the bottom of this page.

For more details on how to play this round, click on the [Instructions](#) link at the bottom of this page.

Instructions
Dictionary
View Discussion
What will happen if...
Save
Done

0 markers remaining out of 50

On-screen text

Instructions button

Results of second usability test

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

Results of third usability test

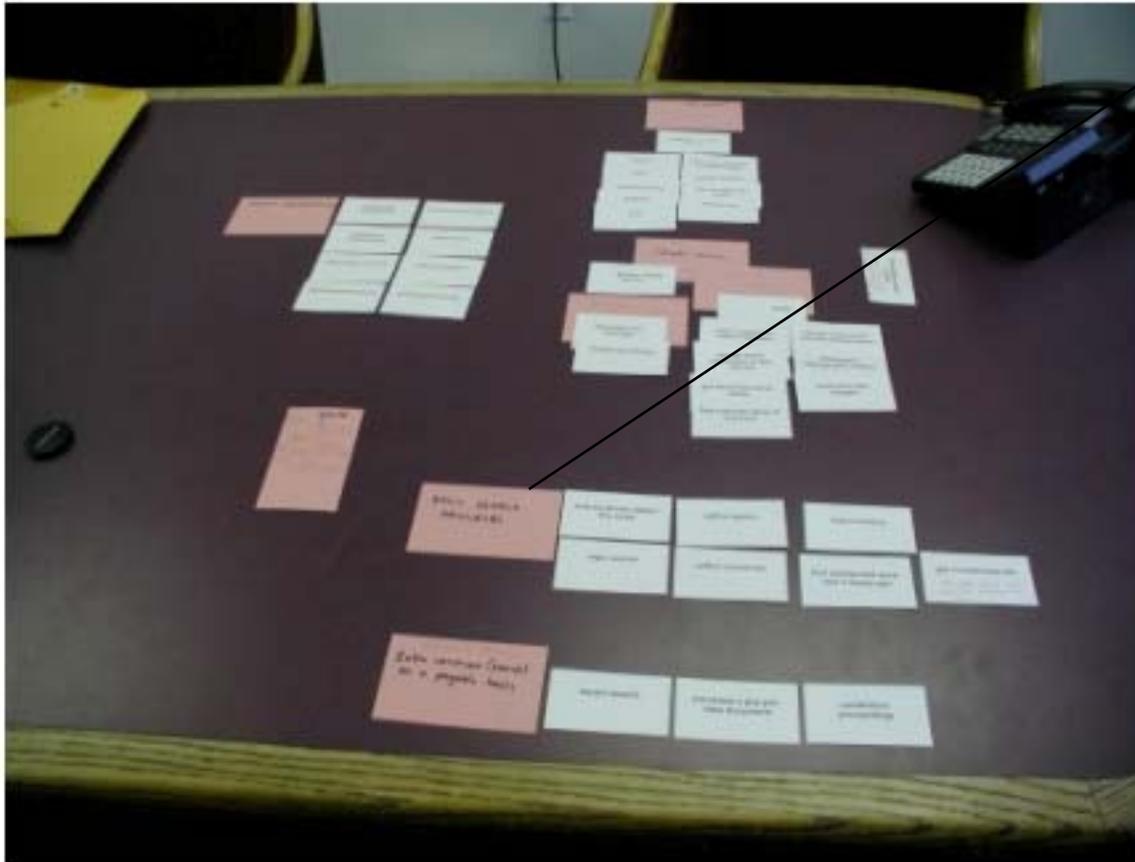
- Users did not open Instructions
- Users succeeded by using on-screen text
- Credit to application team for enlarging screen real estate to improve instructions



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*