

Why Online Help?

Benefits and Implementation Options

Online Help systems are integrated into most software-based products, services, and applications. What exactly is Online Help, what are the different flavors, and what is involved in deploying Online Help? This white paper addresses these questions.

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What is Online Help?

Online Help allows its implementers to “*present the right information to the right people at the right time in the most effective and efficient form*” (Horn). Rather than ask a user to thumb through a document of some type, an effective Online Help system will try to provide the user the most pertinent information related to the specific task that they are performing.

The term "Online Help" generally refers to topic-oriented, procedural or reference information that is delivered using computer software as a form of user assistance. Most Online Help systems are integrated into the final product and are designed to assist end-users of a software application or an operating system, and can be used to present information on a broad range of subjects.

Online Help systems are delivered in a number of formats, such as WinHelp (.HLP files), Microsoft HTML Help (.CHM files), WebHelp, JavaHelp and others. Some Online Help systems utilize features known as *bubble help*, *context-sensitive help*, or *embedded help*, but all Online Help systems are delivered with the software application or operating system that they support.

The Features of Online Help

When properly implemented, Online Help acts as an extension of your technical support team by providing quick answers to your customers' questions. Online Help is superior to other forms of end-user documentation because it is:

- **Integrated.** Online Help is integrated directly into the software interface by selecting an item on a Help menu, by clicking a link or button on the interface, or by pressing a key on the keyboard (such as F1 or Help).
- **Task-oriented.** Online Help provides information that guides and assists the user in real work tasks, not just practice tasks, as found in tutorials.
- **Immediate.** Online Help provides “just in time” information that gives an immediate answer to a question about a specific window, dialog, or field. This saves the company money whenever it obviates a call to the support center.
- **Paperless.** Online Help provides useful information without the need for printed materials. This saves the company money and the end user space on his desk.
- **Expandable.** Online Help provides links to the internet for access to *online reference* material, thus providing all of the advantages of Online Help *and* all of the advantages of server-based solutions from one interface.

Types of Online Help Information

Online Help systems generally contain the following types of information:

- **Concept.** Concept files provide information about basic concepts or principles that are useful for conveying how an application handles certain situations. These files usually help users determine which settings or options are best for their advanced user needs. For example, concept information in a project management application could include a discussion of how to determine what category or status options a company needs to be able to assign them to projects, such as Open, Complete or Internal. The Help information would describe the concept of project status and include considerations for making the

various options available to users.

- **Task.** Task information helps the end user complete a specific task. Each task that the end user can perform while using the application is documented in the Online Help system. Task information in the project management application scenario would tell an end user the steps to use to change the status of a project from Open to Complete.
- **Reference.** Reference files usually provide detailed information about certain aspects of the application, such as menu descriptions, field descriptions, command tables, or syntax diagrams, which is especially helpful in more complex applications. In the project management application example, an explanation of each field a user can modify on a project form (project name, client name, project status) would be considered reference information.

Online Help Implementation Options

Online Help systems can be implemented in several ways:

- **Standalone.** Standalone Help provides basic information about the entire application. Sometimes this is merely an online version of the printed user manual. Standalone Help usually is launched from a common Help button or menu item and displays the main splash screen for the Help system. From this main screen users can browse or search for the information they need. A standalone Help system is a good first step to providing task-based information to users in real time.
- **Window context-sensitive.** Window-level Help provides specific information about the tasks that can be performed from a certain interface screen. This Online Help implementation includes information about every menu, button and command on the displayed interface, which is often linked to other tasks and concepts, as necessary. Window-level Help usually is launched from a unique Help button or menu item on each dialog or screen and displays a specific Help topic for the window it was launched from. From this window-specific topic, users can browse or search for related information.
- **Field context-sensitive.** Field-level Help provides detailed information about how to enter information into a specific field on an interface. This information is especially helpful when a field requires specific syntax that might not be obvious to a new user. Field-level Help usually is launched from a Help button or “hot” area next to or over a field on a window or dialog. Because field-level Help only provides a small bit of information about a particular field or element of an application, it often is implemented in conjunction with a standalone or window-level Help system.
- **Embedded.** Embedded Help refers to task-based information displayed on the application interface that dynamically changes as the user steps through a procedure or process.

While context-sensitive, field-level and embedded Online Help systems are most effective at providing the user the information needed for the specific tasks at hand, these types of implementations also require more effort and cost to deploy.

What is *not* Online Help?

Online Help systems must be differentiated from a similar, but different, brand of information referred to as *online reference* material. Online reference material generally is product documentation stored on a server and delivered through a website. The following are types of online references:

- **Online PDF files.** Many companies place portable document format (PDF) versions of

their product manuals on their websites.

- **Information Centers.** Information Centers are standalone web-based interfaces that enable users to find technical information on a particular product, offering, or solution by providing links that take users to information relevant to the most recent version of a product. While Information Centers can provide much of the same content as Online Help systems, they are not integrated with any application.
- **Knowledge Bases.** Knowledge bases store product manuals, white papers and other related documents in a database and use a web-based search engine to locate information for users.

Online reference material should be viewed as serving a purpose different from Online Help. Such delivery of reference material can be effective in communicating general product information and concepts and is usually targeted at a broader audience than Online Help.

Developing an Online Help System

Online Help needs to work with the user interface and fit into the overall documentation set for a particular software project. However, once it is decided that the users of an application or interface would benefit from an Online Help system, it is best to coordinate the development of the Online Help with the development of the user interface, the interface design, and the documentation plan rather than producing it in isolation or as an afterthought to the project.

The basic steps involved in developing an Online Help system consist of the following:

1. Analyzing the audience.
2. Creating high-level and detailed specs.
3. Performing a task analysis.
4. Creating a content-development plan.
5. Coordinating with the development team.
6. Writing and reviewing the Online Help system topics.
7. Building and testing the Online Help system.
8. Integrating the Online Help system with the application.

The Benefits of Online Help

There are three over-arching benefits that arise from the implementation of an effective, well-designed Online Help system:

- **Making the product/application user-friendly.** A product or application that is easy to configure, use, or administer will be perceived as having a greater value than would otherwise be the case.
- **Higher end-user productivity.** Online Help typically will reduce the amount of time end users spend looking for information or answers related to their use of the product or application.
- **Lower customer support costs.** An Online Help system can reduce the number of inquiries received by the customer support organization responsible for supporting that product or application.

How to Get Started

Online Help gets the “*right information*” to the “*right people*” as effectively as possible. Determining the type of Online Help system that is right for your application requires that you consider the needs of your users. You must analyze how they use your application, what information they need, when they need it, and how you will deliver it. The return on investment for developing the right kind of Online Help for your end users can be measured in fewer calls to technical support and more satisfied users.

Implementation decisions are influenced also by your schedule and budget because of the effort and planning involved in developing the various types of Help. Simple Online Help systems can be developed quickly and fairly easily using the right tools. However, realizing the full range of features available in Online Help systems requires extensive experience in the requisite design and development methodologies as well as the involvement of subject matter experts for the associated product or application.

Citation

¹ Horn, Robert E. Information Design: Emergence of a New Profession. San Francisco: MIT Press, 1999.

About InfoPros

Since 1994 InfoPros has proven its documentation and training expertise with a commitment to best-in-class services and Client-centered solutions. Experienced using DITA/XML, we specialize in delivering a blend of services for documenting products and processes, training development, and translation and localization.

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