User-centered Design of Context-sensitive Help.

Comments by Eswara Rajesh Pinapala.

What is context-sensitive help?

- In theory: Users should be able to access help directly, that focuses on their current needs.
- Should be up to the point, pertaining to user’s current task.
- In practice: Helps is based on user’s current state, action or focus within the software system.
- Enable user to get help when required.
Agenda

• CSH is a shortened form of Context-Sensitive help.
• CSH forms provided in Windows systems.
• User centered help design goals.
• What information goes into effective CSH.
• Look at a few CSH architectures.
• Finally, point some guidelines on CSH.
What to include in a CSH topic?

- 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?
- Dedicated CSH topics are more effective. Help means Answers to questions. We need to know what the questions will be to design better help.
User-centered design

• Users need help while they are engaged in a task.

• They do not need/consult help ahead of time.

• Users require a “Scent of information” that guides them to help.

• Help should always help the user accomplish the task with minimum to no interruption.

• Finally the Goal: Keep the users engaged in task flow.
Comparison of CSH Topics.

• Reference topic based
  o Explain detailed information of subject.
  o Requires search in the entire topic to find answers to questions.
  o Handy at times.

• Procedural topic based
  o Step-by-step instructions of performing a task.
  o Good for users to quickly learn a procedure

• Compare the CSH built in MadCap Flare versions 3 and 4.

• CSH topics type was changed from reference to procedural, apparently in response to requests from customers
Contextual help

• Additional information on the UI that supplements the UI and provides brief, up to the point support.

• Usually displayed in a pop-up window or beside some important fields.

• Contextual help embedded in the application interface, makes sure user doesn't leave the interface.

• Complements web based applications.
Providing deeper contextual 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
Future possibilities: Procedural contextual Help

• In addition to procedure and direction, also provide sequence of actions to perform a task.

• Two possible implementations
  o Balloon help
  o Guided help
Summary

• CSH may be the most frequent way that users access Help.
• You should plan your CSH strategy and write dedicated CSH topics.
• More and more systems are employing procedural help. Procedural help is becoming more popular than reference based help.
• Documenting the application and using the same for CSH may not be a good strategy.
• Identifying and answering likely questions might be a good strategy.
• Layered help to provide deep help may be an effective strategy.
• Guided Help may be an effective way of providing procedural assistance in context.