Help

A Help system may be redundant if you have a FAQ. But once the FAQ grows beyond a few hundred questions, its structure may be hard to navigate. Even when you organize the answers into menu groups concentrating on particular tasks, the fact that every topic is described in the menu as a question may make it hard for users to find precisely the type of information they want, such as a definition or a procedure. Also, many answers combine different kinds of information in a single paragraph, demanding that guests read more than they may want.

Instead of presenting material as a series of questions and answers, Help is often organized around information types such as procedure, reference, concept, definition—and, more rarely, shortcut, troubleshooting, what's new. Looked at as a class of information object, each of these elements responds to a different type of question from the user. By breaking information up into these categories, and signaling exactly what type of information is to be found in each chunk, Help lets people locate the kind of information they want.

Coming from the tradition of documentation, with its dedication to completeness, Help is often more complete than a FAQ, which tends to focus only on the most frequently asked questions. Help quickly fractionates into hundreds or thousands of little pieces, where a FAQ tends to gather together the answers to half a dozen or a hundred questions all on one page.

The differences between Help and FAQs seem to grow out of the history of each genre. Help started as an online accompaniment to software, a hypertext system acting as a substitute or replacement for the manual. Delivered from the user's hard disk or the local server, each chunk appeared quickly, so Help writers could afford to post many small pages, each of which had to be accessed individually. Writers had thousands of tiny chunks they

could throw around. FAQs, on the other hand, started on early Internet list servers, where download speeds were slow. The only content possible was text, so list moderators tended to write omnium-gatherum answers, putting all the answers together in one gigantic ASCII file on the theory that everything was covered there if you would just download, print, and save.

Question: "How do I?"
Answer: Procedure

To understand is hard. Once one understands, action is easy.

—Sun Yat-sen
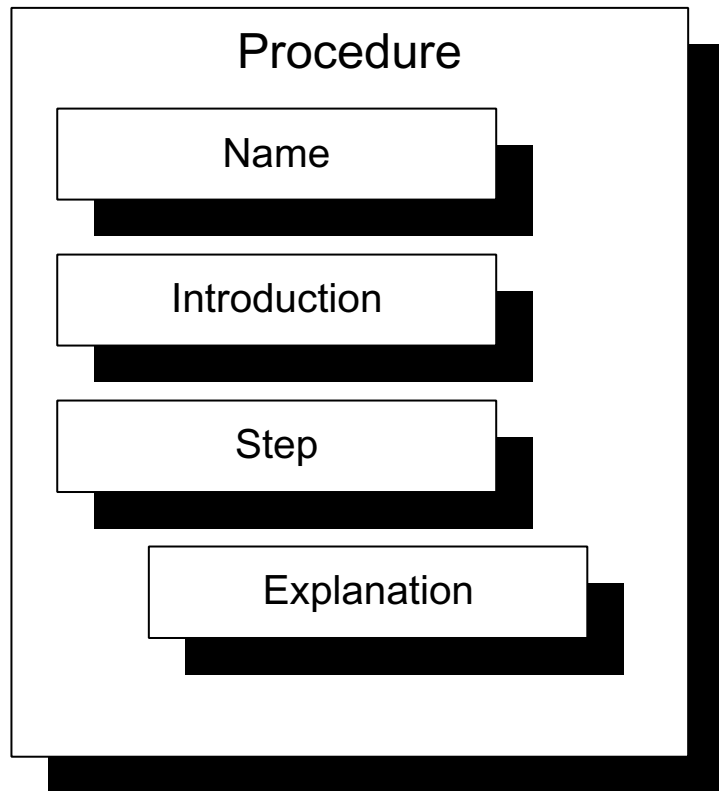
On a Web site, many of the most important questions begin, "How do I...?" We respond with the genre known as a procedure. These instructions are the most important part of Help, because each one promises to take the users one step closer to their goal. To support the individual steps, writers have, over time, come up

with many other components for a procedure, each of which answers a related or follow-up question. Looked at from a high level, the architecture of a generic procedure has four parts:

- What task does this procedure help me do? **Name**
- What should I know before I start? **Introduction**
- What do I do now? **Step**
- Can you explain that? **Explanations**

Naming the procedure. Because your guests will be trying to find this particular procedure among hundreds or thousands of other procedures, write the name to express the procedure's content in terms that the guests actually use (their terms, not yours). Because the name appears as part of a menu, your language should show why you put this procedure into that particular group, at this particular position in the sequence. You need to distinguish this procedure from others like it, while showing, through your choice of words, how they are related (why they belong together on a menu). Neat challenge. In this context, you are writing a single phrase that expresses the content accurately, and acts as a meaningful part of the menu. To add to these constraints, you should adopt a consistent grammatical form for the names of all procedures ("How to..." or "Doing...." or "To do this...."). The point is to telegraph to users that every item with that kind of phrase will be a set of step-by-step instructions. You are articulating the information type, so users can choose a procedure when that is what they want, or skip it when they want some other kind of information.

Introducing the procedure. Americans don't like introductions, but the French do, and many Japanese insist on them. Therefore, you may need to make any introduction into a distinct object, so it can be removed during customization or personalization. An introduction may be justified if you think the user may have questions about the subject of the procedure or the preparations needed. As you explore your audience's skills, knowledge, attitudes, expectations, problems, and goals, you may come to see that certain questions come up fairly often, as they get ready to perform an action. Those throat-clearing questions demand particular components in your introduction.

- What is the purpose of this procedure? **Goal statement**
- When would I do this, and why? **Context**
- What tools do I need? **Tool list**
- What do I have to do first? **Prerequisites**
- Is there some key idea I need to understand before I start? **Concept**
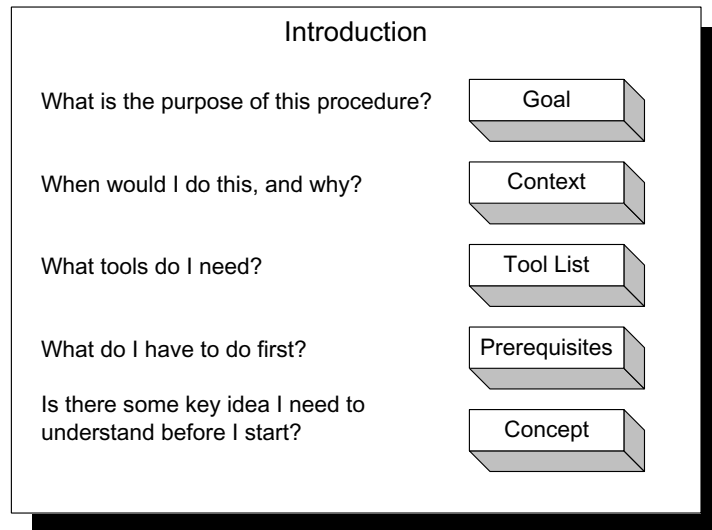
You probably won't have to offer your guests every one of these components. The point is to think through what exactly an introduction can do for people, and decide which of these components, if any, are really needed.

Thinking about the function of each possible element lets you discard a lot of junk. For instance, many designs require an introduction just so the name doesn't butt into the first step, visually—and so writers come up with dud intros. For instance, if the procedure is "How to return a product," then a pointless intro would be, "This procedure shows you how to return a product." Don't commit this kind of nonsense.

Writing the steps. Each step gives an instruction, the raison d'être of the procedure. Here are some battle-tested strategies for writing steps that people can understand and act on:

- **Put one action per step**. Not two or three. (People expect one action per step, and get confused when you try to cram more in. In fact, users often miss the second or third, or do the third before the second, and wonder why the results are screwy).
- **Number the steps**. You increase their effectiveness with numbering. People make fewer mistakes, and keep going in order, when you add numbers. Don't use bullets, which suggest that every item is optional. Numbering may convince people to do steps in order.
- **Begin each step with an imperative**. Give direct orders that make clear what the user ought to do right now. OK, you can explain where to operate, when, or why, ahead of the verb, if you really must but keep that orientation short.
- **When describing the same action, use the same language**. You're not reaching for a cornucopia of phrases here. You just want to say what to do. And if the user ought to carry out exactly the same action, such as clicking, submitting, entering...make sure you describe it the same way each time. Otherwise, people begin to suspect a significant difference, where there is none.
- **Limit the number of steps**. If you get much above a dozen steps, you lose people. Perhaps they need fewer steps than fingers, to keep track of their progress, get a sense of the shape of the procedure, handle it all within a few minutes. We don't know why, but we do know that having more than half a dozen steps risks error, and more than a dozen, well, as the editors say, MEGO. (My eyes glaze over).

Explaining the steps. Make sure any explanations show up in separate paragraphs, because you may want to reuse the steps in many different locations without the relevant explanations. If you offer customization and personalization, people will probably want to be able to pick and choose which types of explanation they want to view or hide. Explanations tend to proliferate if you let them, so find out which questions your audiences ask most often. Then you can decide which elements your audiences want most, out of a list like this:

- What do you mean by that term you just used in the instruction? **Definition**
- What should I watch out for here? **Warning**
- How do I carry out the step? **Note** or **Elaboration**
- Could you give me a hint here? **Tip**
- What's the result? **Feedback** or **Result**
- Could you show me what my work ought to look like? **Illustration**
- What does that show? **Caption**
- But I didn't get that result. How can I recover? **Remediation**
- Could you give me an example showing how this is supposed to work? **Example**

The end of all knowledge is to understand what is fit to be done; for to know what has been, and what is, and what may be does but tend to that.

—Samuel Butler,
Prose Observations

Explanations of a Step

What do you mean by that term?	Definition
What should I watch out for?	Warning
How do I carry out the step?	Elaboration
Could you give me a hint?	Tip
What's the result?	Result
What should my work look like?	Illustration
What does that show?	Caption
How can I recover from a problem?	Remediation
Could you give me an example?	Example

Carving explanations up into separate paragraphs, each addressing a specific type of question, makes the explanations into distinct elements, so you and your users can reuse, include, or exclude them on the fly. Planning several distinct explanation types speeds up writing, too, because you are not trying to weave several different kinds of information together into a compelling paragraph. You are just sorting facts into bins—and in the process, your prose gets simpler, more purposeful, and, because you are just answering one question per paragraph, it seems abrupt.

Yes, some of these paragraphs end up being one sentence. If that answers the question, hey, that's all you need.

Question: "What's that?"
Answer: Reference

Sometimes, people just wonder what an icon, tool, feature, or field is for. If you are thorough, you'll give functional definitions of every part of your site's interface, from the shopping cart to the department buttons. This kind of reference material should be short enough to appear in a rollover, tiny pop-up, or label on the pages. Repeat the info within the Help system, if you offer one, because some people don't realize they can hover to get more information, or click the magic *i* in a circle to get information. And some don't even notice a label.

Focus your description on the purpose of the interface element. "Puts today's date in the form" gets the point across better than a simple noun, "Date."

Your first level of organization will be the parts list, the process flow, or the vocabulary of the programming language. Then each of those gizmos gets a full interrogation—the complete set of questions you've developed, each leading to a particular reference element. For instance, for a command reference, you might answer the following questions with individual elements:

- What's the purpose of the command? **Functional definition**
- What's the syntax? **Syntax diagram**
- What do those parameters do? **Parameters**
- Can you give me an example of the way I would use this? **Example**

- What do I have to do before using this command?
  Prerequisites
- What actually goes on when I issue this command?
  Processing
- What do these messages mean, during the operation?
  Messages
- What results can I expect? **Results**
- What should I watch out for? **Warnings**
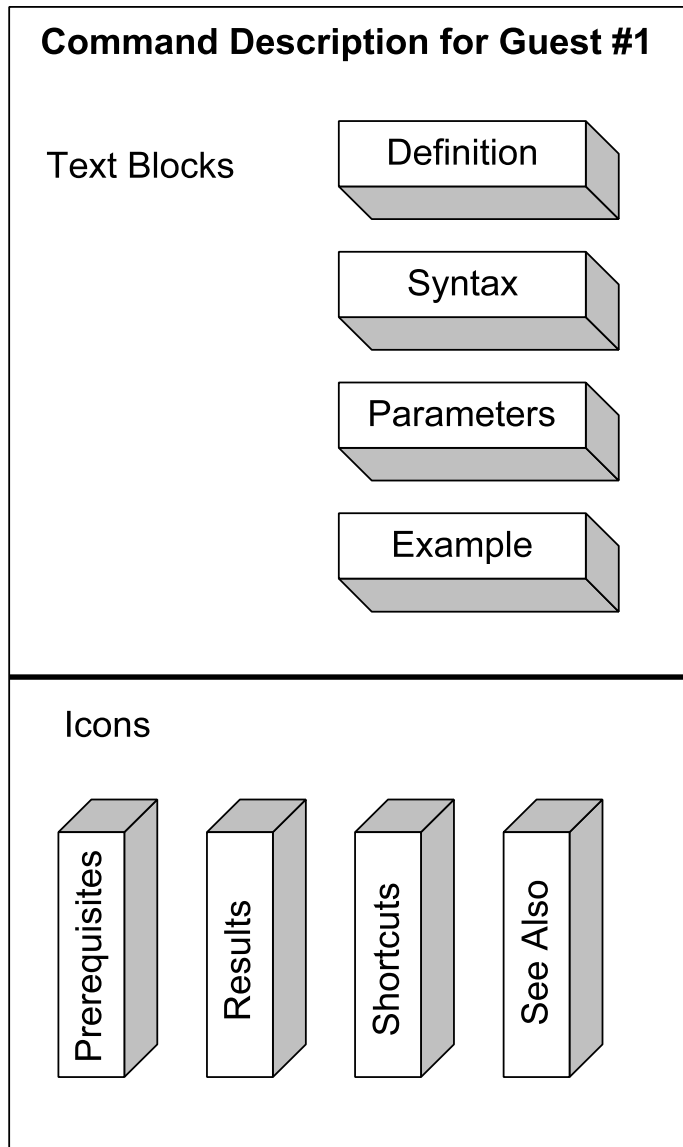- Is there another way to get the same effect? **Shortcuts**
- Is there some more information about this command?
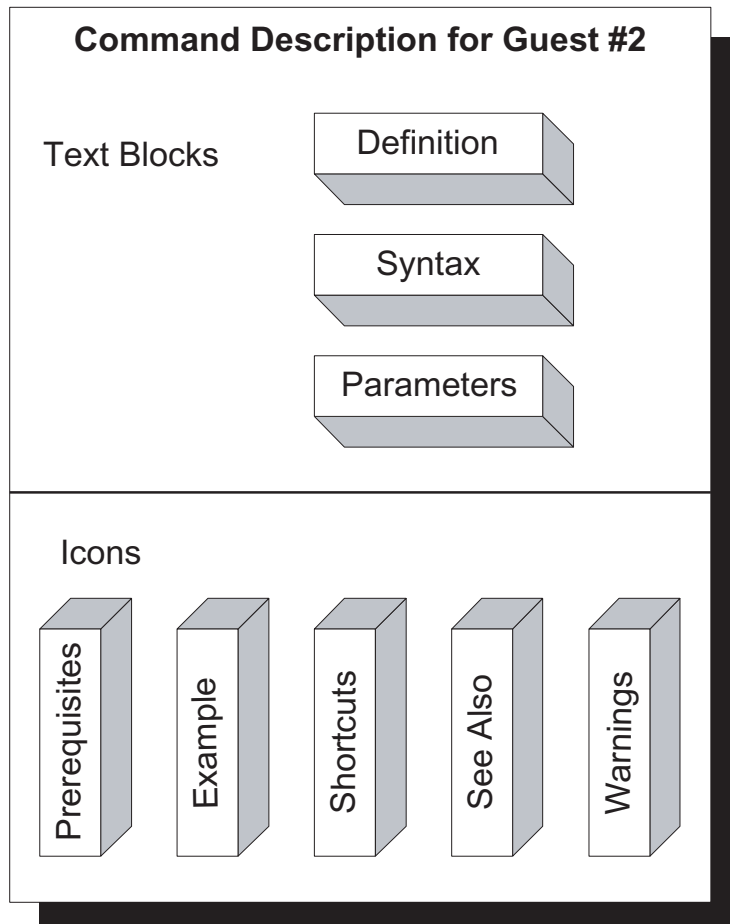 **See Also**

Command Description

Question	Topic
What's the purpose of the command?	Definition
What's the syntax?	Syntax
What do those parameters do?	Parameters
Can you give me an example?	Example
What's do I have to do first?	Prerequisites
What actually goes on when I issue this command?	Processing
What do these messages mean?	Messages
What results can I expect?	Results
Is there anything I should watch out for?	Warnings
Is there another way to do this?	Shortcuts
Is there more info about this?	See Also

Creating a standard model of reference speeds up your writing because the architecture simplifies your research (you know what to look for), organizes the writing (you know where each fact goes), and reduces the size of each paragraph (once you answer an element's question, you stop).

Command Description for Guest #1

Text Blocks

Definition

Syntax

Parameters

Example

Icons

Prerequisites

Results

Shortcuts

See Also

You can also offer guests the opportunity to pick and choose which elements they want displayed in their own personal reference pages. For instance, one guest might choose to have only four text blocks displayed at first—the Definition, Syntax, Parameters, and Example—making icons out of Prerequisites, Results, Shortcuts, and See Also, so that kind of information would be available in pop-up windows, but only when requested. This guest chooses to hide all other elements. A second guest might want even less information displayed initially, choosing instead to have more icons. By chunking your reference material in discreet objects, you make that kind of personalization possible.

Command Description for Guest #2

Text Blocks

Definition

Syntax

Parameters

Icons

Prerequisites

Example

Shortcuts

See Also

Warnings

Question: "What's the big idea?"
Answer: Concept

Concept chunks explain an idea, a process, or a relationship. Often, you want to be able to send people to these "About" sections from several different procedures for background information. The problem is that you may be developing the concept from a few notes from an engineer, several drafts of purple prose from marketing, and one oracular statement from the boss.

Sort your information into a structure by answering your user's questions with elements like this:

- Can you summarize this idea for me? **Overview**
- What does that mean? **Understanding X**
- How do I apply this idea? **Using X**
- Where can I find out more? **Resources**
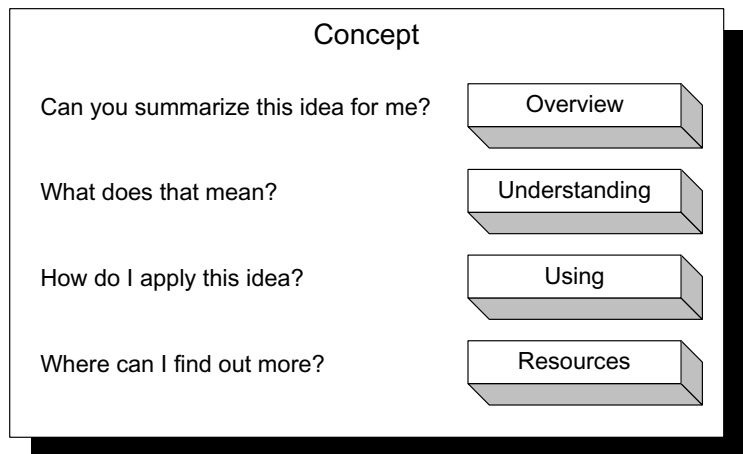
Overview: Start with the familiar and proceed to the new, so people can build their own model, attaching the new ideas to ones that already exist in their head. They understand more that way and remember it longer. Stress the goal—the reason why this concept is important to motivate people to read more. Without that rationale, why should they bother? You're arousing their self-interest by describing a common need, a widespread problem, or a startling opportunity.

Understanding: Put your main point first, because this section

acts like a miniature essay, beginning with the gist of the idea itself, the kernel, and then moving onto the details.

Figure out consciously how you are going to organize those details. The biggest problem with most concept sections is disorganization. Sometimes, writers start off suggesting that the section will follow one order, such as a quick march through history, then veer off into a completely different structure, such as goals followed by methods of achieving them. The structure should echo ordinary patterns of thought:

- Most important to least important. Excellent for impatient readers.
- Familiar to unfamiliar. Best if you are modifying an existing idea, product, or process.
- Most common to least common. Appealing because it postpones the esoterica.
- Chronological order. Very easy to understand, particularly if you are describing a series of actions.
- Problem and solution. Dovetails well with marketing claims.

Whatever structure you decide on, advertise it up front and follow it methodically. In a way, the opening sentences promise the reader that you are going to organize the material in a certain way. Do what you promise, and drop in adverbs and adjectives throughout the text signaling that you are continuing to follow that path. For instance:

The most important...almost as critical...somewhat less significant...a trivial observation.

Ordinarily....often...commonly...not so often...rarely.

Huge...moderate in size...even smaller...tiny.

In this way, you help people anticipate what is to come, and, as they read, integrate new ideas with existing ones, expanding their model of the information in a way that guarantees they will understand, and remember it well.

Using: Explain how the idea actually works in practice. You've led people through its purpose and explained the key aspects of the idea. Now describe how it applies, moving forward chronologically

through a series of decisions. (You're not writing a step-by-step procedure here. You're narrating a process, so you are at a much higher level than individual procedures. If you've written relevant procedures, provide them in links for the person who wants to know exactly how to do one of these chores).

Resources: Conceptual overviews demand intense concentration, and in this situation you can distract people by throwing in a lot of unimportant references.

Postpone any references to white papers, specs, templates, benchmarks, books, backup sites, or standards until the end. By removing these citation links from the rest of the text, you make it easier to read, and you allow a guest to choose to have the resources included or excluded during customization.

Question: "What does this term mean?" Answer: Definition

The simplest definition—a sentence or a phrase—can be offered when someone hovers over the term. You display rollover text just above the term or pop up a little window with your tight definition.

But these brief definitions, being generic, cannot reflect the particular context, so guests often want more information, and many rollovers lack any way for users to click for more info. Even the definitions in pop-up windows (where such links would be possible) seem a bit austere, lacking detail and links to further resources.

To address this problem, some Web sites make key terms into links taking you to a whole page with an extensive description of the term, so that guests can get a fully rounded picture of the topic without going anywhere else. The downside is that guests have to leave the page they were on, in order to understand. The plus is that the target page, offering so much information, may be all the person needs.
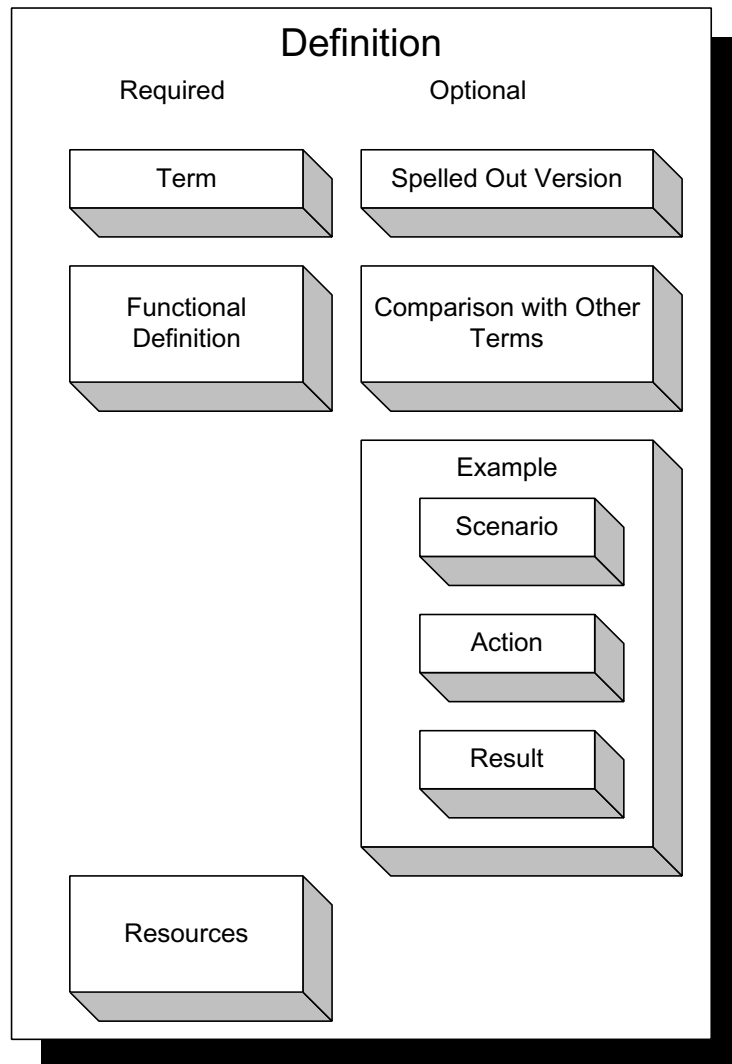
This more generous description starts off like a standard glossary chunk with the term itself, and—if it is an acronym or abbreviation—the spelled-out version. But then the description may include several different definitions explaining what the tool, department, option, or gizmo actually does in different contexts. The key here is functionality: what actions proceed from this thingamajig? Or, more pointedly, what good is it to me?

If the term is often confused with similar or related terms,

devote a section to sorting out those distinctions. How is *Clear* different from *Delete*, *Kill*, *Expunge*, and *Erase*?

For each definition, consider including an example. To succeed, an example must set the stage, indicating what the main character wanted to do, describe the action taken, and then report on the results. In this way, your guests can decide whether their goals are similar to those of the heroine before they risk taking the action; and they can consider your description of results to confirm that this is the way they want to go.

Finally, link to resources, giving the full title, and, if relevant, description, date, and status. Your definition chunk should be acting as a pointer to a lot of content, so write these annotated links to let your guests know what they can expect to find out in the ether, before they make a false click.
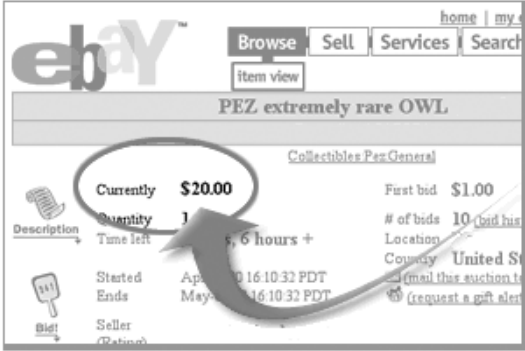
See: Abella and Clements (2001), Boggan, Farkas, and Welinske (1996), Duffy, Palmer and Mehlenbacher(1992), Hackos and Stevens (1996), Honebein (1997), Horton (1990), Nielsen (1999f), Price and Korman (1993), Price (1997, 2000), Welinske (2001), Wexler (1998).

Case Study: Help at eBay

The huge auction site eBay grabs newcomers with a big, blue oval superimposed on an orange search bar, right underneath the main menu (Browse, Sell, Services, Search, Help, and Community). "Welcome new users!" Inside the oval is a button urging you to register, plus four more ovals, asking:

- New to eBay?
- How do I bid?
- How do I sell?
- Why eBay is safe.

Clearly, the help team realized they need to catch newbies, and show them how to search, browse, buy, and sell—while reassuring them that they're safe. Each of these pages shows screenshots (what a breakthrough!), with arrows swooping into the key locations, and text on the right giving instructions. At the bottom of each of these beginner pages, they invite people to go to eBay

Education, Help Basics, a Guided Tour of Registration, or a Letter from the Founder. Then, best of all, the Help team includes a riff that they put at the bottom of every Help page: "Still have a question? Search for help on"—and we see another search box with the button Find Help. This convention is great; the team never makes me scroll back up to the top to locate a search box. I also get the feeling that they understand I may not have gotten exactly what I was after, that I may still be looking, despite all their efforts, and their little offer to do another search warms my heart.

The tone of the introduction to each procedure is casual but quick.

> If you need help finding stuff to bid on, visit <u>New to eBay</u>? Once you find an item you're interested in, take these easy steps:

The writers have used a link to take care of the prerequisite (you have to have found a product before you make a bid), inserted the minimal marketing pitch, and casually passed over the self-contradiction involved in offering multiple levels of help on an activity that is, they claim, easy. So we see a lightweight introduction, branching to several other sources of help.

Even the conceptual stuff explaining security is broken up into short chunks, each with a few sentences explaining the idea ("Instantly check the 'reputation' or business practices of anyone at eBay."), and a link letting you learn more or take action.

When I click Help Basics, I go to a page of help on help, showing me 13 different ways to get information—six branches of Help (basics, buyer guide, seller guide, my info, billing, rules and safety), plus online courses through eBay Education, discussions in the Community Help forum, appraisals of an item, advice about improving my listings, a glossary of terms, and top questions (half a dozen answers in each of six categories such as Bidding and Selling). Wow! You can see that the Help team believes in offering a ton of information (we once started printing out every Help page on eBay, but we stopped after 700 single-space pages). Plus, they give you several different paths to the same information, so you could start out in New to eBay, Help Basics, Buyer Guide, or deep

within one of those (for instance, on the Tips for Buyers page) and still end up at the same information about placing a proxy bid. Then, just to be Weblike, the Help team writes up the same subject two or three different ways.

Making sense of the architecture here is a metaphysical challenge. But few users need to work out the structure of these overlapping Help resources (only the staff needs to grok it). What works, in a very hypertexty way, is the sheer abundance of information. If you can't find what you want over here, you'll probably bump into it over there.

Almost every Help page has a Search field at the top, inviting you to explore titles and descriptions if you want, or even run a smart search. (No thanks, I'd prefer a stupid search.) At the bottom of Help pages, usually, there's another search field, with a Find Help button.

Ironically, the top Search only looks at the auctions, while the bottom one, only looks at help pages—a distinction that may not be obvious, despite the difference in button names. Still, once you realize which search form to use, the mechanism delivers a rich set of relevant links to other help pages.

Best of all, when I go to a page that came up in a Help Search, the site recognizes that's why I came to the page, and, at the bottom, asks whether the page really answered my question.

> eBay values your feedback. Does this search result answer your question?
>
> Click Yes or No.

This kind of feedback form convinces me that the team is really trying to find out whether their search mechanism works for users, and even though I am only one of three million users, I get to vote. Great idea.