

New Trends in Online Help

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What we'll cover in this presentation

- Six new trends within the user assistance community
- The context and reasons for each of these trends
- Issues and challenges to consider
- Advice on how to decide whether each trend is right for you

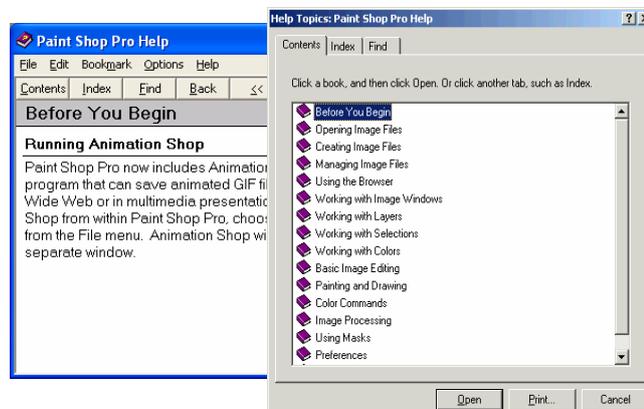
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Trend 1: Tri-pane-based to embedded

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Origins of the tri-pane model

- WinHelp 4 (Windows 95)
 - Separate windows for content and navigation

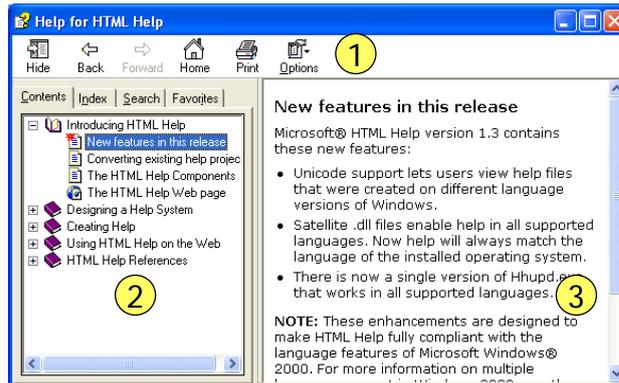


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Origins of the tri-pane model

- HTML Help 1.0 (Windows 98)
 - Navigation moved into left-hand pane within main Help window

1: Toolbar
2: Navigation pane
3: Content pane



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The tri-pane gains momentum...

- All the following Help formats have adopted the tri-pane model:
 - WebHelp (eHelp, now Adobe)
 - WebWorks Help (Quadraley)
 - JavaHelp (Sun Microsystems)
 - Oracle Help for Java (Oracle)
 - Microsoft Help 2
 - FlashHelp (eHelp, now Adobe)
 - WinHelp 2000 (eHelp, now Adobe)



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Advantages of the tri-pane model

- Great for reference information
- Comfortable and familiar for author (and user?)
- Enables Help authors to work independently from software developers
- Many authoring tool options

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Disadvantage of the tri-pane model

- Help is a separate world that users have to choose to enter



Application



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So what's the solution?

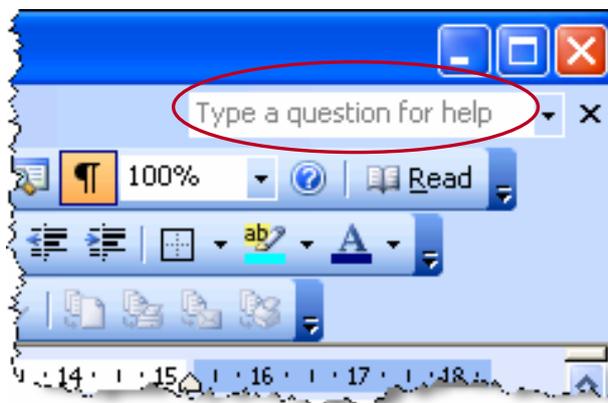
- Break down the barrier between application (task) and Help
- Richer links:
 - From application to Help
 - From Help to application
- Help becomes part of the application UI

“Embedded User Assistance”

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Better access to Help: Embedded links from application UI

- Search in Office 2003



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Links to procedural Help topics

The screenshot shows the 'Enter Bills' form in QuickBooks Online. The form includes fields for Vendor, Ref #, Bill Date, Amount Due, Terms, and Due Date. A help overlay titled 'How Do I...' is positioned over the bottom right of the form, listing the following links:

- ▶ Track expenses?
- ▶ Enter a bill?
- ▶ Track 1099 payments?
- ▶ Edit a bill?

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Links to definitions and explanations of terms

The screenshot shows the 'Customer Billing Info' form. The 'Is sub-customer?' checkbox is checked, and a link 'What is a sub-customer?' is circled in red next to it.

The help dialog box provides the following information:

What is a sub-customer?
Use sub-customers when you want to enforce a hierarchical relationship between customers. Sub-customers can represent many things:

- Jobs
- Projects
- Cases
- Customer locations
- Groups within a larger organization

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Embedded user assistance content

- Static snippets of user assistance throughout the UI
- Dedicated user assistance pane

Notes

- Both of the above need to be designed in from the start
- A user assistance specialist must be involved in the UI design/creation process

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User assistance as part of UI

100_5128.JPG - Microsoft Digital Image Starter Edition 2006 Editor

File Edit View Insert Text Format Touchup Effects Tools Help

Common Tasks Files Stack Selection Zoom 27%

Create a Photo Collage

1 Click an orientation:

Portrait

Landscape

2 Select a layout on the right. To place your picture(s) on the layout, click Next.

Album Collage - 7 Photos

Album Collage - 9 Photos

Album Collage - 12 Photos

Album Collage - 16 Photos

Album Collage - 20 Photos

Next > Cancel

7.10 x 5.36 inches X,Y: R,G,B

Embedded user assistance – or simply part of the UI?

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An alternative approach: Balloon Help

- Help balloons overlaid on application
- “Proactive” – does not require the user to request Help
- If possible:
adapts to user’s experience and
behaviour

Notes

- Less need for the Help author to be involved in the design of the UI
- However, make require significant planning and coding from developers

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Example of Balloon Help

The screenshot shows the TechSmith SNAGIT application interface. A yellow callout box with the text "Balloon may include link to tri-pane Help" points to a balloon help window titled "Tip: Profile Settings". The balloon help window contains the text "Snagit offers a wide range of capture options. Explore other options by clicking the [Show me more] link." The "Show me more" link is circled in red. In the background, a "Snagit Help File" window is open, showing a table of contents with "Using the Profile Settings Pane" selected. The main application window shows a "Profiles" section with "Text from window" and "Record screen video" options. The "My Profiles" section is also visible.

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Trend 2: HTML-based to XML-based

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Reasons for trend towards XML-based publishing

- Increasing demand for single-sourcing and information re-use
- Availability of tools, technologies and standards – many of them free
 - Authoring tools
 - Transformation engines
 - DITA
 - DocBook
- Microsoft's new Vista Help technologies

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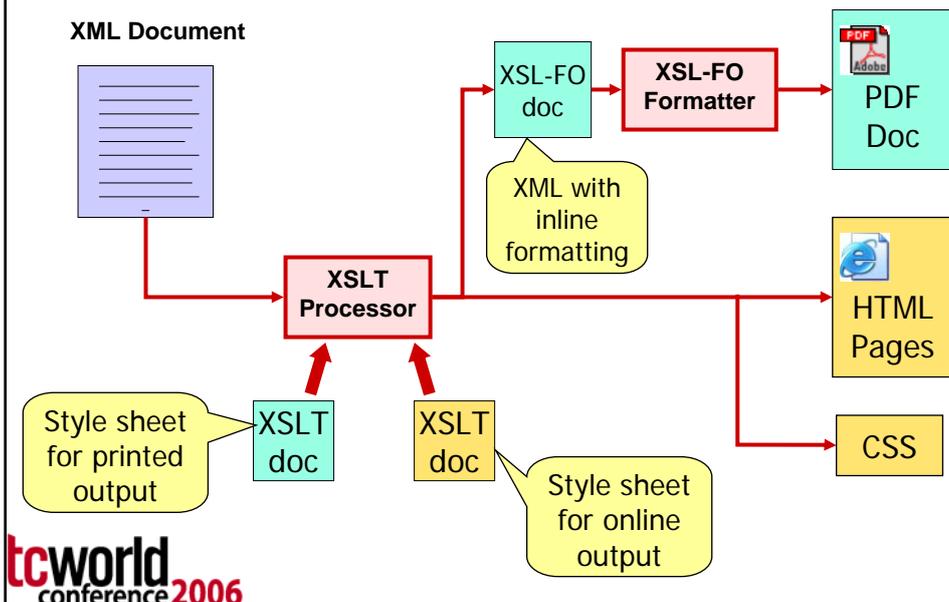
Remember:

XML is not a display format

- XML is used for rich and semantic mark-up of source content
- Think of it as a way of storing information in a database
- For some authoring tools (such as Help & Manual or Flare) you need not be aware of the XML code
- XML is transformed (usually to HTML or PDF) for delivery to end-users



XML Transformation process



Reasons to move to XML publishing

- Requirement for multiple deliverables from a single source
- Requirement to localize for multiple languages
- Desire to use open (non-proprietary) tools, technologies and standards

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Issues with XML

- Migrating to XML often requires a significant up-front investment
- Using your own custom Schema/DTD requires considerable XML and XSLT expertise
- XML-based Help authoring tools are less mature than HTML-based tools

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Trend 3: Client-based to server-based

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Typical characteristics of server-based Help

- Single point of delivery
- Updated as needed
(continuous publishing)
- Usage tracking and reporting
- Offline version installed to user's own
hard disk (airplane Help)

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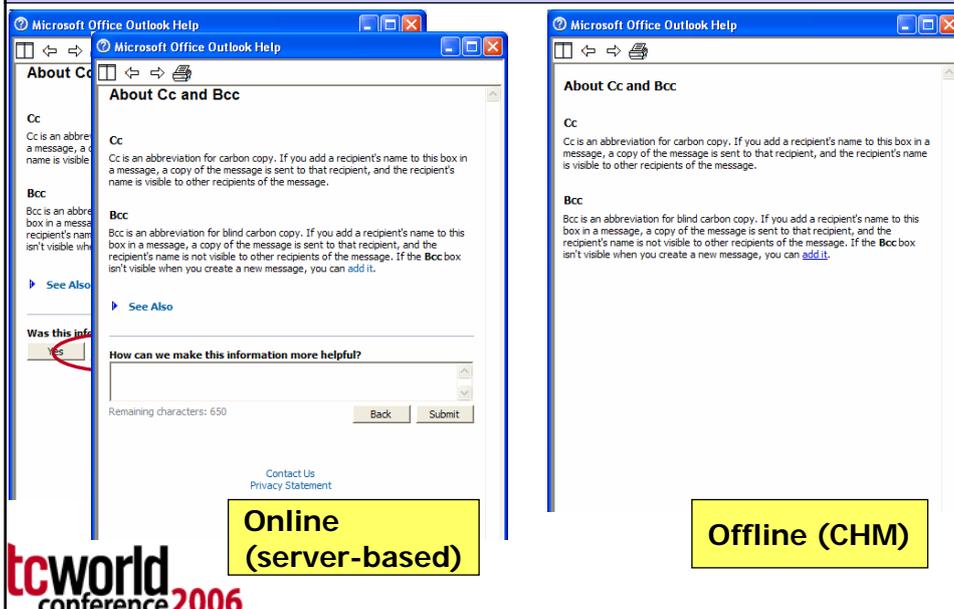
Case study: Microsoft Office 2003



- Microsoft's mantra: "Better when connected"
- when connected to the Internet: Help queries default to server-based content
- When not connected: Help queries are diverted to local CHM
- Server based content also available through Office Online website
- User feedback: "Content Watson"

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Comparison of online and offline content



The image shows two side-by-side screenshots of the Microsoft Office Outlook Help window. The left window, labeled 'Online (server-based)', displays the 'About Cc and Bcc' page with a 'Was this info helpful?' section at the bottom containing a feedback form with a 'Submit' button. The right window, labeled 'Offline (CHM)', displays the same page but without the feedback form. A red circle highlights the 'Was this info helpful?' section in the online version.

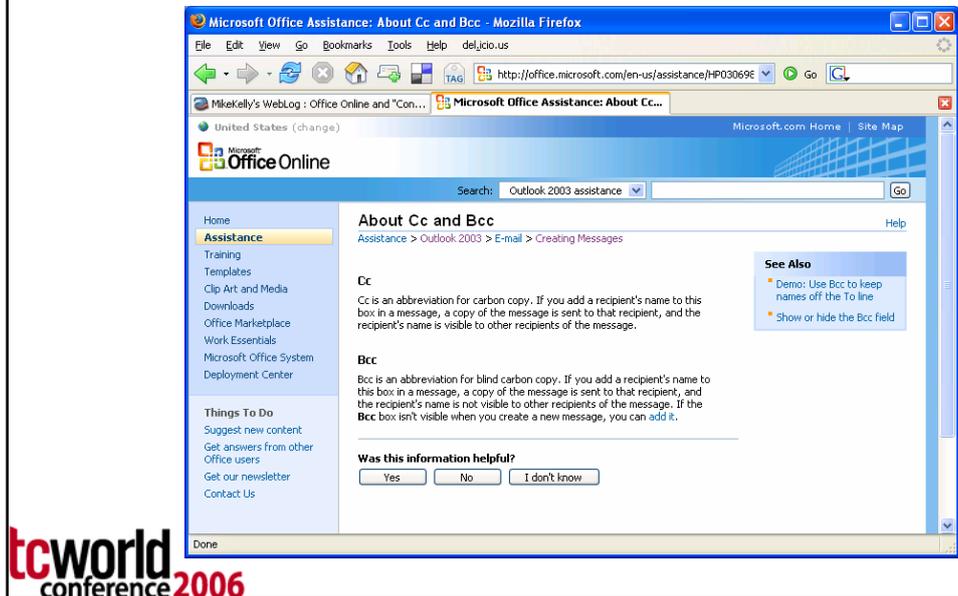
Online (server-based)

Offline (CHM)

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New Trends in Online Help

Office Online website



Content Watson

- An extension of "Crash Watson"
- Feedback stored in SQL Server database and tagged with an Asset ID
- Daily asset-level summaries
- Authors read comments and make changes
- Also:
fine-tuning of search results is possible



Trend 4:

Increased competition for RoboHelp

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RoboHelp release history

- In 11 years from 1992 to 2003, 13 major versions:
 - 1 to 7
 - 2000
 - 9
 - 2002
 - X3 to X5
- In three years since 2003, no major new versions

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Since 2003...

- 2003:
eHelp acquired by Macromedia
- 2004:
Development of X6 well underway
- 2005 Q1:
RoboHelp unofficially "sunset"
- 2005 Q4:
Macromedia merged with Adobe
- 2006 (April):
Adobe announces there will be a new version of RoboHelp in 2007
- 2006 (October)
Beta program for RoboHelp X6 starts

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In the same period:

- MadCap Software forms and releases versions 1 and 2 of **Flare** (dubbed as an XML-based "RoboHelp replacement")
- Quadralay releases XML-based **WebWorks ePublisher Pro**
- EC Software releases XML-based **Help and Manual v4**
- ComponentOne releases **Doc-to-Help Enterprise 2006** (with support for HTML source content)
- Innovasys releases XML-based **HelpStudio 2**

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RoboHelp's current strengths

- RoboHelp has many strengths, including:
 - Market share
(*de facto* industry standard)
 - Stability and robustness
 - Ease of use for creating standard tri-pane Help
 - Indexing
 - Conditional text support
 - Headers and footers
 - Etc.

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RoboHelp's current key weaknesses

- WebHelp's cross-browser support
 - WebHelp pre-dates Win XP SP2, Firefox, Internet Explorer 7, and other recent browser releases
- Print output
 - Hyperlinks are not converted to cross-references
 - Limited control over page layout from within RoboHelp UI
 - Difficulties in controlling numbered and bulleted lists

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RoboHelp's current key weaknesses

- Limited possibilities for information re-use
 - Popups
 - Glossary Hotspot Wizard
- HTML source code
 - Kado tags
 - HTML Help controls
 - No semantic mark-up

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Source code example

RoboHelp X5

```
<!--Metadata type="DesignerControl" startspan
<object CLASSID="clsid:A2F1FA63-C1E6-11d2-9140-
006DC83B9955" ID="SeeAlso BORDER=0 style="margin-top: 0px;
margin-bottom: 0px; margin-left: 0px; margin-right: 0px;
vertical-align: baseline;" align=bottom>
<param name="_Version" value="65536" >
<param name="_ExtentX" value="1508" >
<param name="_ExtentY" value="609" >
<param name="_StockProps" value="13" >
<param name="ForeColor" value="0" >
<param name="BackColor" value="14215660" >
<param name="UseButton" value="-1" >
<param name="UseText" value="0" >
<param name="ControlLabel" value="See Also" >
<param name="UseIcon" value="0" >
<param name="Items" value="Accounts$$$" >
<param name="Image" value="" >
<param name="FontInfo" value="Arial,8,0,,," >
<param name="_CURRENTFILEPATH" value="C:\RoboHTML
Training\Locator\Welcome.htm" >
<param name="_ID" value="SeeAlso" >
<param name="DialogDisplay" value="1" >
<param name="Frame" value="" >
<param name="Window" value="" >
<param name="ChmFile" value="" >
<param name="DisableJump" value="0" >
</object-->
<OBJECT
CLASSID="clsid:ADB880A6-D8FF-11CF-9377-00AA003B7A11"
ID="SeeAlso" TYPE="application/x-oleobject">
<PARAM NAME="Command" VALUE="ALink,MENU">
<PARAM NAME="Button" VALUE="Text:See Also">
<PARAM NAME="Font" VALUE="Arial,8,0,,,">
<PARAM NAME="Frame" VALUE="">
<PARAM NAME="Item1" VALUE="">
<PARAM NAME="Item2" VALUE="Accounts">
</OBJECT>
<!--Metadata type="DesignerControl" endspan-->
```

Doc-to-Help 2006

```
<BUTTON class=C1HGroupLink
d2html="group=Accounts;displayin=menu">
See Also</BUTTON>
```

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Trend 5: Single author to collaborative authoring

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Popularity of user forums and communities

The screenshot shows a Mozilla Firefox browser window displaying the Madcap Forums website. The page title is "Madcap Forums :: Index - Mozilla Firefox". The address bar shows "http://forums.madcapsoftware.com/". The page content includes a forum index with the following data:

Forum	Topics	Posts	Last Post
General Discussion This forum is for all Flare issues not related to any of the other categories. Moderators: trent the thief, andyr, linker68, smarlett, SteveS	318	2050	Thu Oct 26, 2006 11:19 am Carsten Pedersen
Getting Started This forum is for all Flare issues related to getting started with the application. Moderators: trent the thief, andyr, linker68, smarlett, SteveS	25	113	Mon Oct 23, 2006 5:49 pm RamonS
Importing This forum is for all Flare Versions issues related to importing. Moderators: trent the thief, andyr, linker68, smarlett, SteveS	85	325	Thu Oct 26, 2006 2:25 am wclass
Styles, Stylesheets and XML This forum is for all Flare issues related to styles, stylesheets and XML. Moderators: trent the thief, andyr, linker68, smarlett, SteveS	161	910	Wed Oct 25, 2006 11:10 pm SteveS
DotNet Help This forum is for all Flare issues related to the DotNet Help target. Moderators: trent the thief, andyr, linker68, smarlett, SteveS	15	83	Tue Oct 24, 2006 8:35 pm petermbo
Microsoft HTML Help This forum is for all Flare issues related to the Microsoft HTML Help target. Moderators: trent the thief, andyr, linker68, smarlett, SteveS	86	468	Thu Oct 26, 2006 6:57 am wclass
WebHelp			Thu Oct 26, 2006 7:24 am

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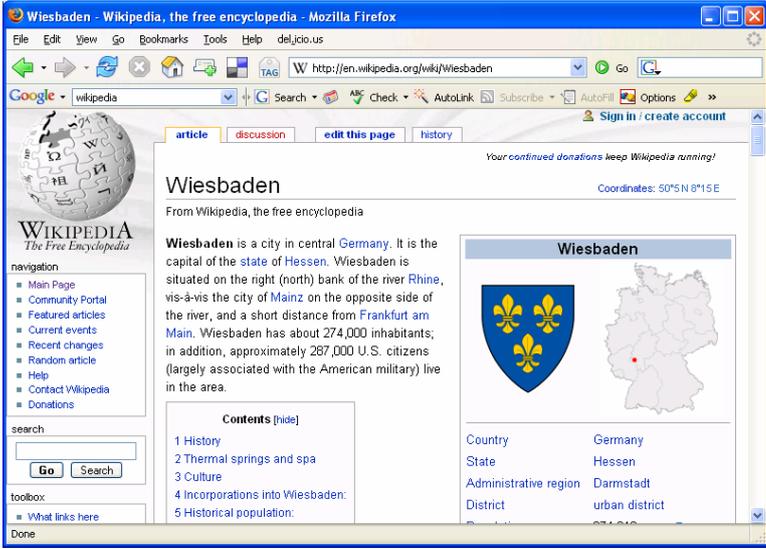
Can we extent this principle to documentation and online Help?

- What if...
 - Readers “subscribed” to the text?
 - Readers reviewed the text?
 - Readers edited the text and corrected errors?
 - Readers collaboratively wrote the text?

- Possible using Wikis

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Example of a Wiki: Wikipedia



The screenshot shows a Mozilla Firefox browser window displaying the Wikipedia article for Wiesbaden. The browser's address bar shows the URL <http://en.wikipedia.org/wiki/Wiesbaden>. The page content includes the Wikipedia logo, a navigation menu, a search box, and the main article text. The article text states: "Wiesbaden is a city in central Germany. It is the capital of the state of Hessen. Wiesbaden is situated on the right (north) bank of the river Rhine, vis-à-vis the city of Mainz on the opposite side of the river, and a short distance from Frankfurt am Main. Wiesbaden has about 274,000 inhabitants; in addition, approximately 287,000 U.S. citizens (largely associated with the American military) live in the area." To the right of the text is a section titled "Wiesbaden" containing a coat of arms, a map of Germany with Wiesbaden marked, and a table of administrative information.

Country	Germany
State	Hessen
Administrative region	Darmstadt
District	urban district

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Facts about Wikipedia

- 70 articles per hour added
- 3.8 million entries, 100 languages
- Budget of \$800,000
- 1 employee (but 48,000 contributors)
- Shown to be almost as accurate and reliable as Encyclopaedia Britannica, and...
- Constantly revised and updated

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Example 1 of Wiki for documentation

The screenshot shows a Mozilla Firefox browser window editing a wiki page. The address bar shows the URL: `http://ximbiot.com/cvs/wiki/index.php?title=CVS--Concurrent_Ver...`. The page title is "Editing CVS--Concurrent Versions System v1.12.12.1: Overview (section)". The page content includes a search bar, navigation links, and a text area with code snippets and paragraphs explaining CVS.

==== What is CVS? ====

<p><small>CVS</small> is a version control system. Using it, you can record the history of your source files.

</p>

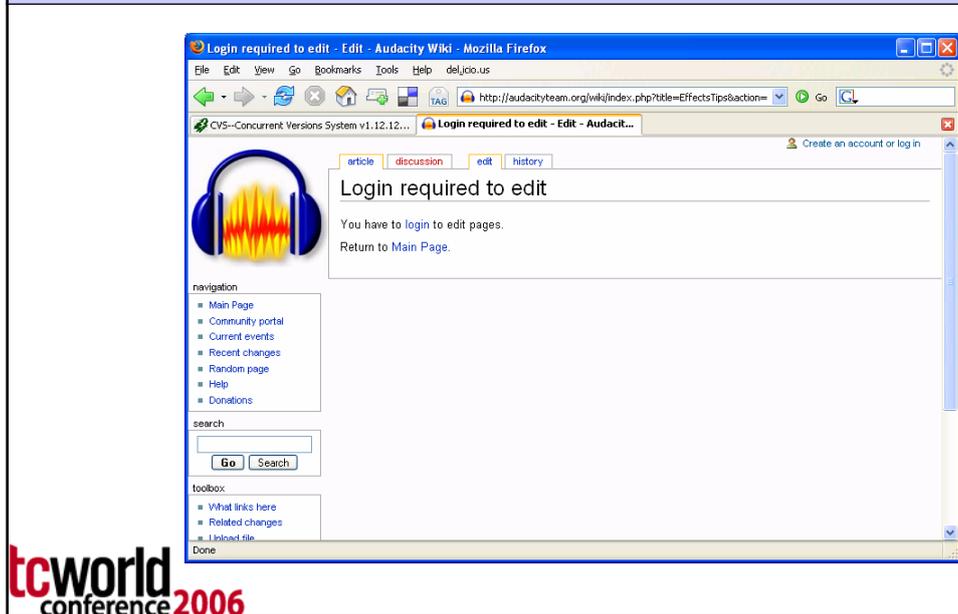
<p>For example, bugs sometimes creep in when software is modified, and you might not detect the bug until a long time after you make the modification. With <small>CVS</small>, you can easily retrieve old versions to see exactly which change caused the bug. This can sometimes be a big help.

</p>

<p>You could of course save every version of every file you have ever created. This would however waste an enormous amount of disk space. <small>CVS</small> stores all the versions of a file in a single file in a clever way that only stores the differences between

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Example 2 of Wiki for documentation



Wiki issues

- Content needs editing for consistency and flow
- Potential accuracy problem
- Accountability
- Safety/security issues
- Litigation
- Difficult to make context-sensitive



Trend 6: Multimedia and "show me" demos

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Reasons for trend towards rich media

- Rise of broadband Internet access
- World-wide ubiquity of Flash Player (installed on 97.3% of Internet-enabled desktops)
- Maturity of simulation tools such as TechSmith's **Camtasia** and Adobe's **Captivate**

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Issues with simulation tools

- Simulations are high-maintenance
 - UI changes force re-recording
 - Localisation issues
- Users do no real work

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An alternative approach – Guided Interaction

ActiveHelp UI overlaid on web application

2. Select Location(s) where you wish to search for sales by clicking inside the Location Search box, scrolling to see selections, and clicking on your choices.

For multiple selections, hold down the CTRL key (Macs use Command key) while clicking selections. Click OK when you're done.

Click For ActiveHelp

Specialized Search

- Admin/Support
- Finance
- Healthcare
- Human Resources
- Management
- Public Service
- Sales
- Technology

College

Company Name

Contract/Term

Diversity/Inclusion

Executive

High School Advice

Work Abroad

Only this part of the application UI is active

Third-party tools (such as ActiveHelp) are becoming available

Also: Active Content Wizard in Windows Vista

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Questions?

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