

Guided Help: A Revolution for Software Help and Support?

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What we'll cover in this session

- What do I mean by Guided Help?
- "Traditional" demonstration and eLearning applications
- The limitations of these applications
- Guided Help technologies
 - Microsoft Guided Help
 - Gteko GTAgent and GTSolve
 - Rocket Software's ActiveGuide
 - Solan Technologies eTracker
- An alternative: Training Card Help

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What do I mean by Guided Help?

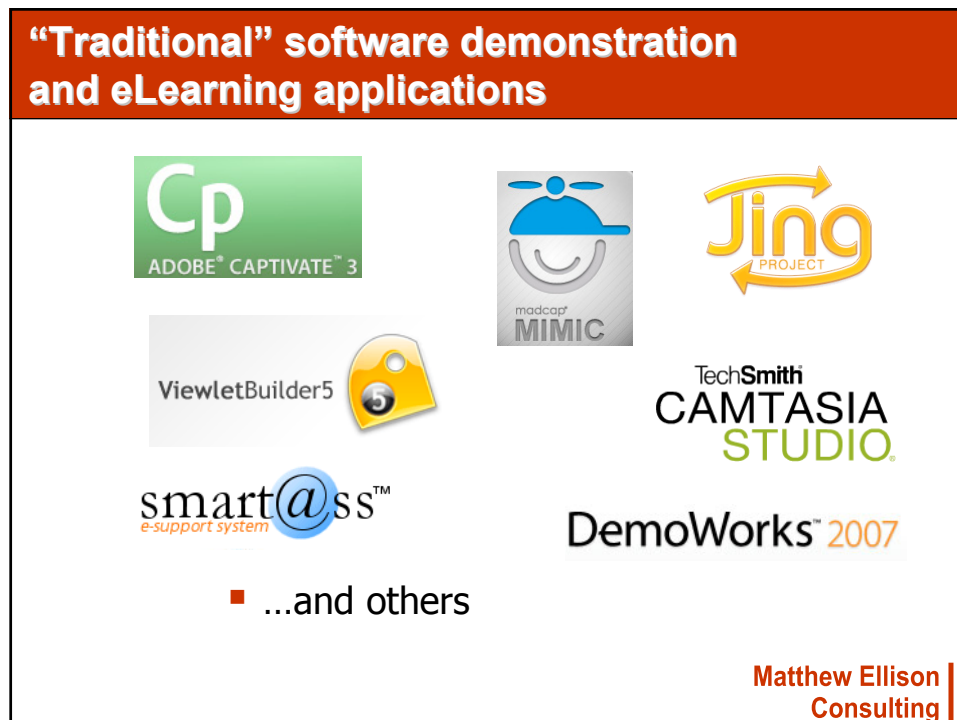
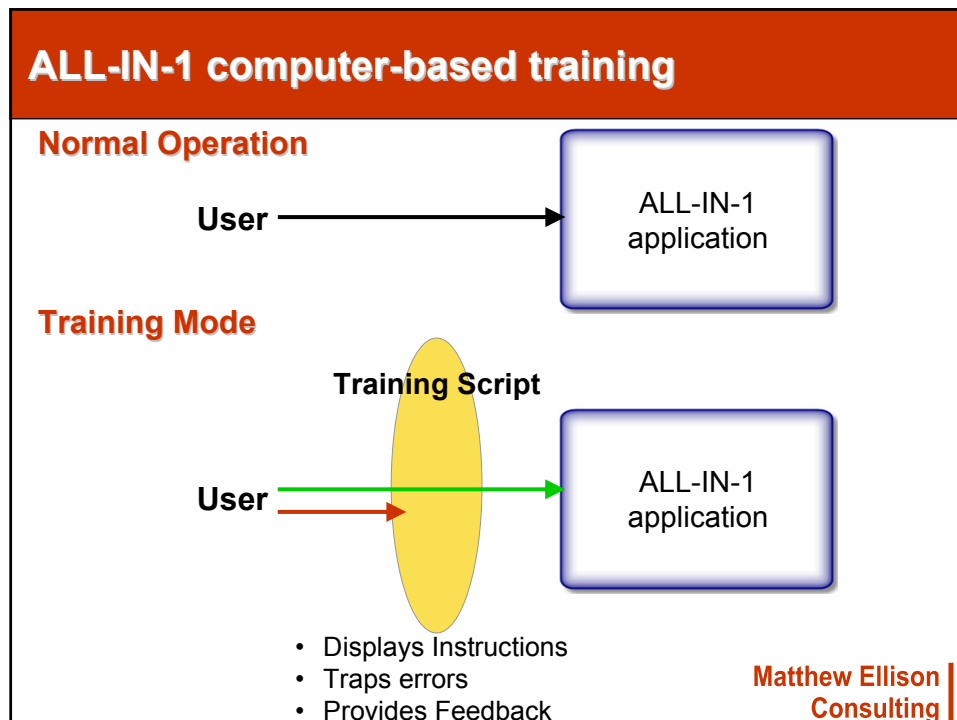
- Help that leads users through a real task using the **real/normal** application UI, adding the following:
 - Highlighting of controls
 - Captions with step-by-step instructions and additional information
 - Error-trapping
 - Optional automation
- Guided Help is **not**:
 - A Flash-based simulation
 - A Wizard

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My first experience of Guided Help

- 1986: creating computer-based training for Digital's ALL-IN-1 office automation suite
- Menu options:
 - CM (Create Mail)
 - ED (Edit Document)
 - **TR (Training)**
- TR option launched script that displayed instructional content and requested user input
- Correct input was passed to the application

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“Traditional” software demonstration and eLearning applications

- Simulate the application
- Record task either as key screens or full-motion video
- Play back task as either:
 - full-motion video (demonstration) or
 - interactive screen images (training simulation)
- Uses Flash or other video playback technology
- Usually viewed in a browser

Demonstration

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Pros and cons of simulation

Potential Advantages

Does not require the application to be available

Provides “safe” environment for training and practice

Enables tasks to be performed “out of context”

Potential Disadvantages

Users can’t actually complete real tasks as they learn

Training simulations are restricted to predefined set of “correct” actions

Localisation requires the task to be re-recorded with the localised application

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Microsoft Guided Help



- Available through Help in Windows Vista (online only) – one of CNET's top 5 things I love about Windows Vista
- Can be downloaded from some Microsoft Knowledge Base articles (see <http://tinyurl.com/oey82>)
- Authoring tools available only to Microsoft and OEMs
- Relies on good accessibility in application code – uses Microsoft® Active Accessibility (MSAA)

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Microsoft Guided Help



- Two modes:
 - Do it automatically (why wouldn't you?)
 - Show me step-by-step
- “Show me” mode is not a Wizard because it uses the normal UI (with superimposed captions and highlights)

[Demonstration](#)

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So why did Microsoft remove it from Vista?

- Maintenance and test costs:
 - Every Windows Update required Guided Help topics to be retested and potentially updated
- Security:
 - In the past 3 years there have been 5 critical-level security bulletins relating to HTML Help and its ActiveX control
 - Guided Help topics are just as powerful and represent a potential future security threat

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Other examples of Guided Help

Two main areas:

- PC fault diagnosis and automated support
- Electronic Performance Support Systems (EPSS)

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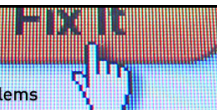
Support or Help?

- Many Guided Help solutions are targeted at the Support sector
- Automated support can result in great savings for large OEMs and ISVs
- Guided Help simulates an expert taking control of your PC
- Too helpful to be considered Help?
- Is there an artificial barrier between Help and Support?

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Gteko

Real Solutions for Real Problems

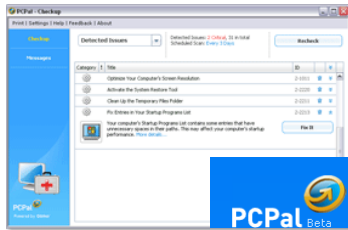


Gteko
A Microsoft Subsidiary

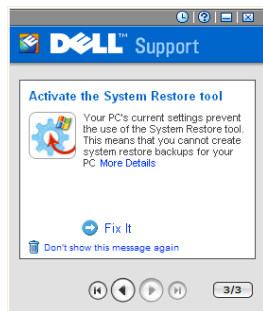
- “Networking and support software for the digital home”
- Making complex PC technology easier for home users
- Major customers: HP, Dell, Canon, NEC
- Acquired by Microsoft in November 2006
- Key Guided Help technologies:
 - GTAgent
 - GTSolve

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Where you can see Gteko technologies in action



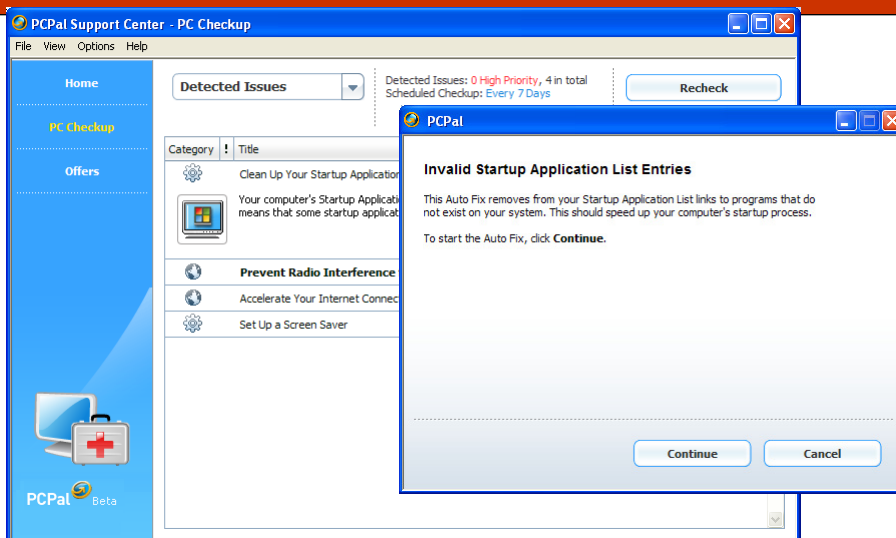
- PCPal – a free downloadable tool that runs checks and fixes on your PC



- Branded OEM support systems (such as DELL Support)

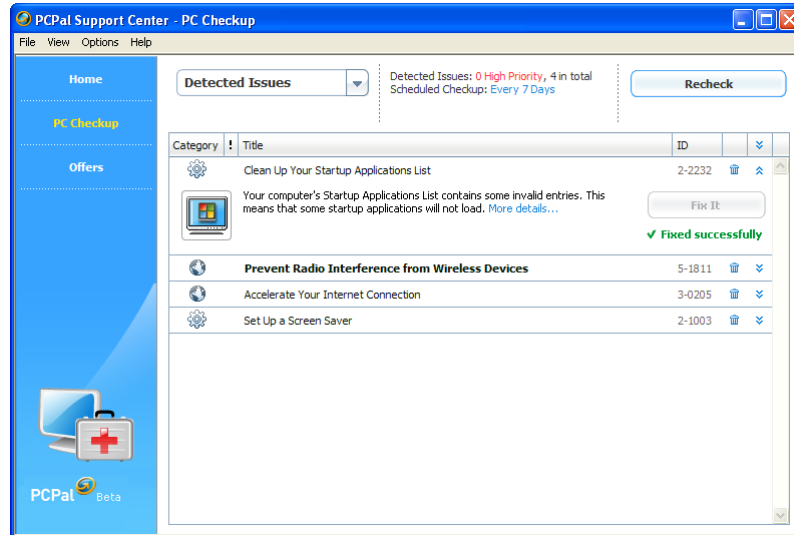
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PCPal – Automatic Fix



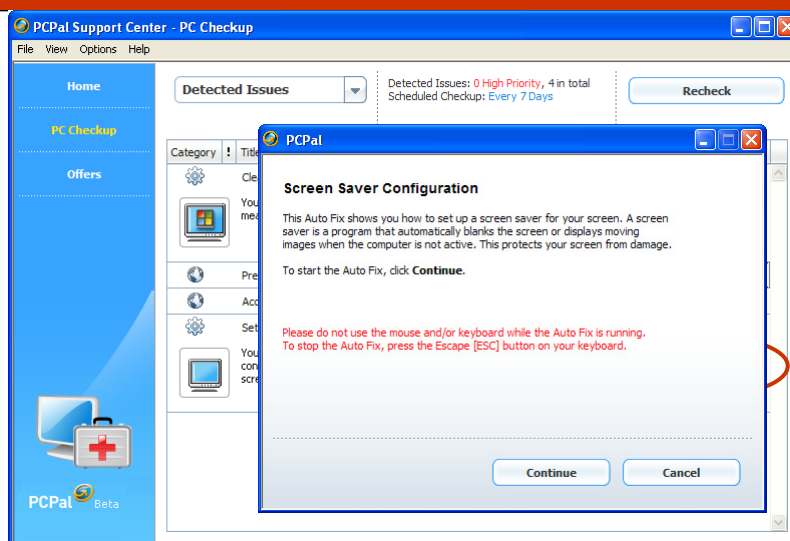
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PCPal – Automatic Fix



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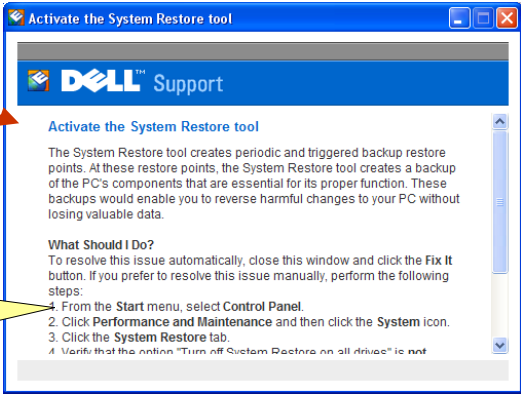
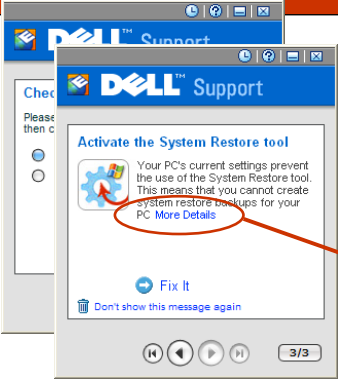
PCPal – Auto Fix



Demonstration

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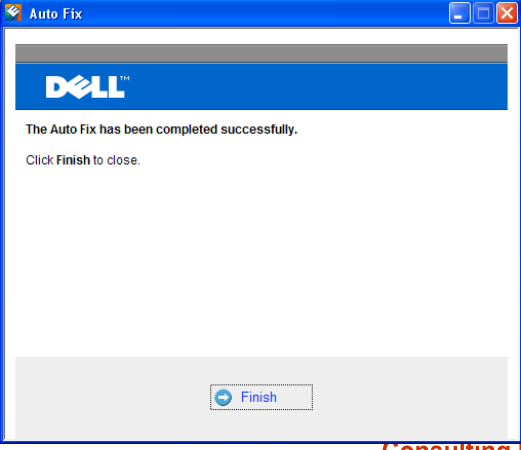
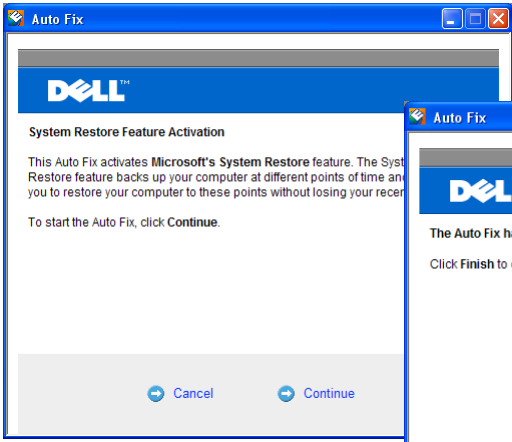
DELL Support



Provides regular step-by-step instructions as an alternative to the Auto Fix

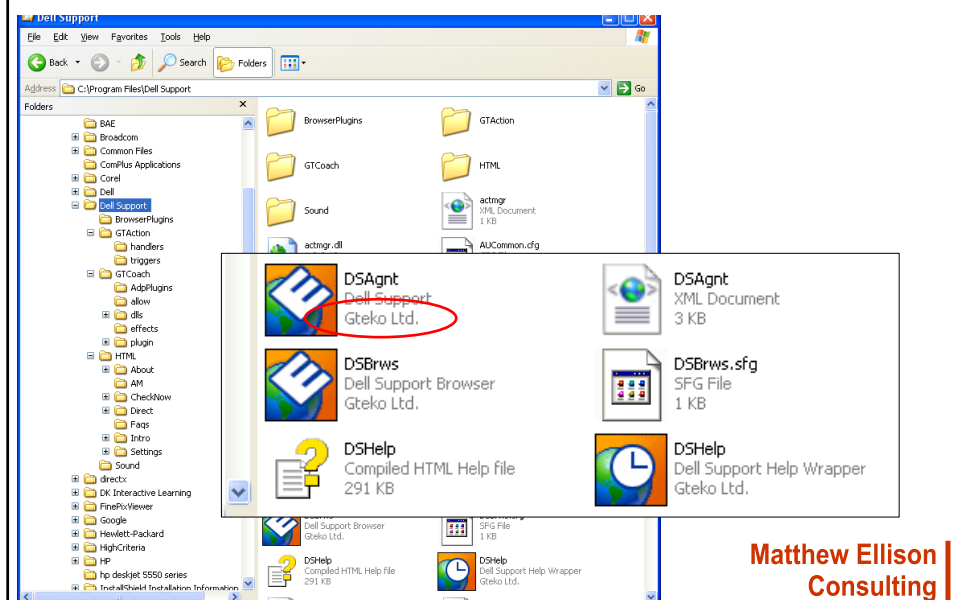
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DELL Support



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DELL Support – beneath the surface



Rocket Software's ActiveGuide



- Targeted at EPSS market
- Aim is to reduce/eliminate documentation through "smarter" applications
- Enables you to create interactive or do-it-for-me Help
- Runs client-side JavaScript to overlay additional UI components on a Web-based application
- Doesn't touch the code on the server
- GUI-based authoring tool (no JavaScript skills required)
- ActiveGuide dialogs contain standard HTML and can potentially be edited by users

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The screenshot shows the 'IntroDemo - Web Studio' application window. On the left is a sidebar with a list of tools and a 'Done' button at the bottom. The main workspace displays a web page with a header for 'activeguide' and a content area with the text 'You must first determine the patient's status as:'. A 'Highlight Tool' dialog box is open in the foreground, with the 'Highlight Settings' tab selected. This tab contains a checkbox for 'Enable Accompanying Text Balloon', a text area for 'Text Balloon Content', and a 'Text Options' section. The 'Text Options' section includes checkboxes for 'Transparent' and 'Leading Margin', a 'Border' input field, a 'Border Color' dropdown, and a 'Text Balloon Location' grid. The grid contains several text balloons, with one in the second row, third column labeled 'Highlighted Target' and highlighted with a red rectangle. Other settings include 'Back' (a dropdown), 'Automatic Size' (checked), 'Height' (50), and 'Width' (100). The 'Done' button in the sidebar is highlighted in blue.

ActiveGuide issues

- You don't need to be a programmer to create ActiveGuide content, but the level of technical skill is higher than required for a typical HAT
- Poorly coded applications may not be accessible to ActiveGuide
- Changes to the server-based application can cause problems for ActiveGuide

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Solan Technologies



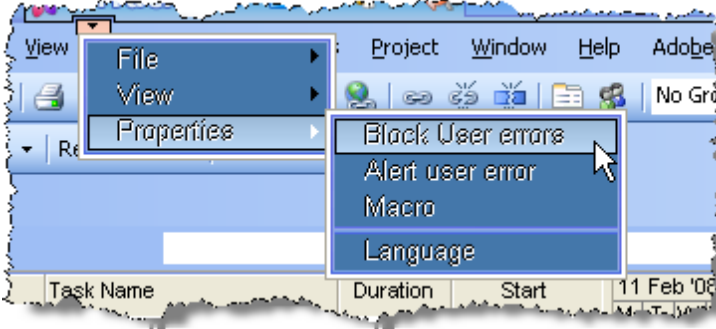
- Real-time on-line **Navigation Guidance & Monitoring Tool**
- Runs as a non-intrusive overlay for any application (including Web apps)
- Can run either in silent or active modes
- Can provide seamless guidance for tasks that involve multiple applications
- Monitors users' performance

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 **eTracker**

- Choice of modes to suit the needs of novice through advanced users

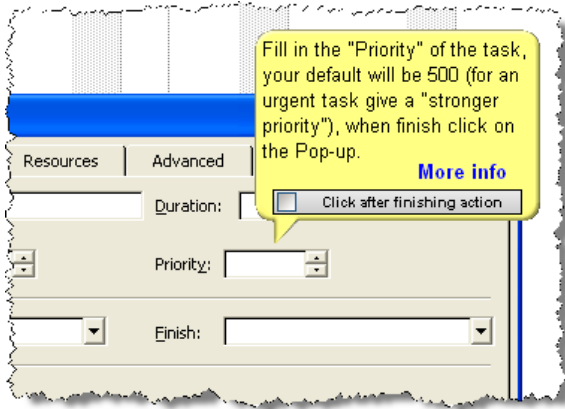


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 **eTracker**

- Text caption overlays live application
- Link to more information
- Caption is continuously positioned correctly



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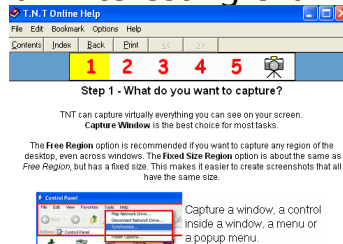


- **Authoring:**
 - No programming skills required
 - Tasks are "recorded" and then captions and branching added
 - A complex scripts can be created in 4 hours

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A low-tech alternative: Training Card Help

- Available with Microsoft HTML Help
- Two-way communication between application and Help
- Requires significant co-operation from application programmers
- See EC Software's TNT Screen Capture for an interesting example



Demonstration

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Conclusions

- Guided Help is potentially very powerful and effective
- However, there are significant maintenance and security issues – these have caused Microsoft to drop Guided Help from Vista
- Guided Help excels for critical troubleshooting and fix issues – can we use the same techniques in software user assistance?
- The technology exists and is becoming more widely available

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