Best Practices for Embedded User Assistance

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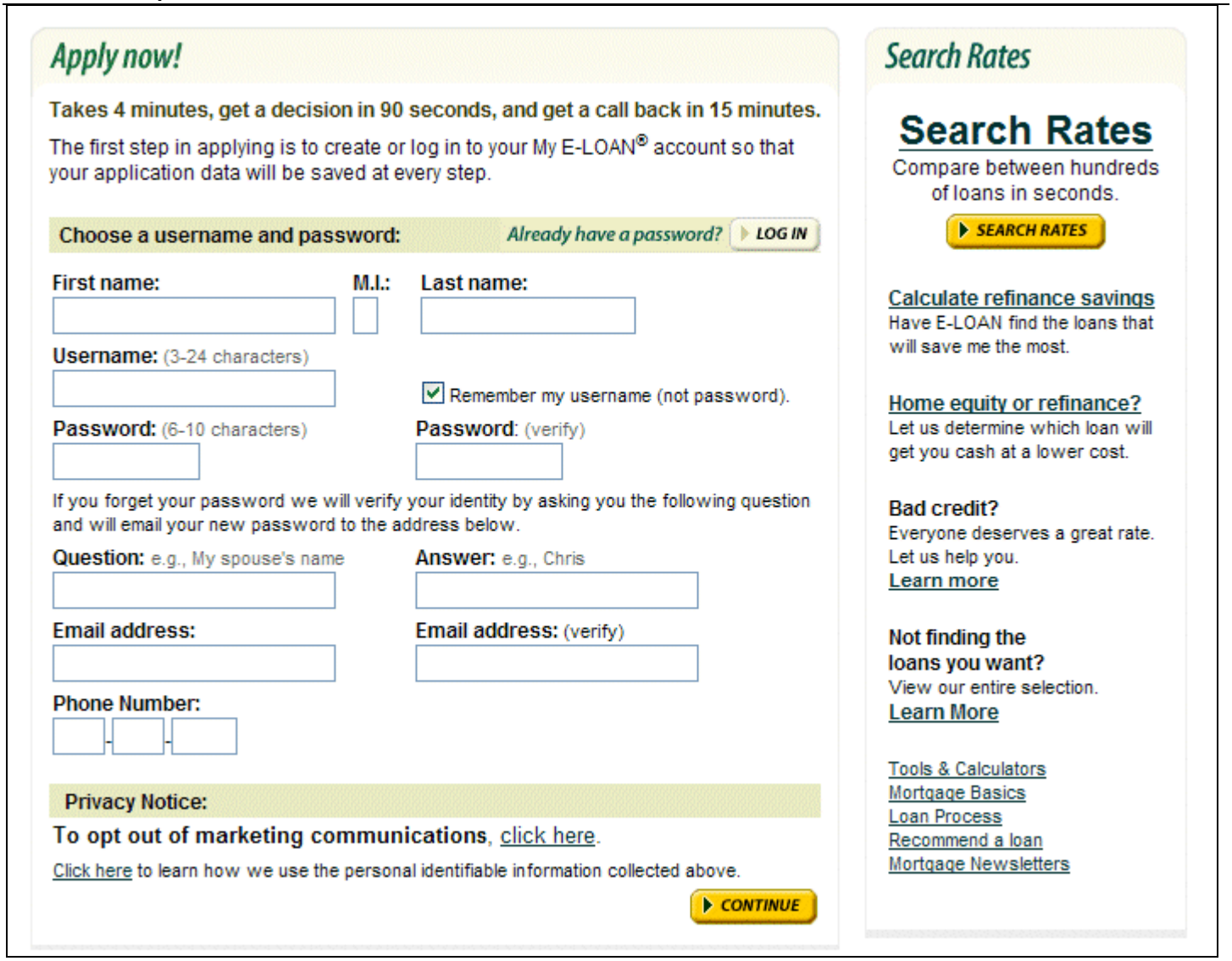
Embedded UA includes any instructional information inside a user interface. For mobile devices, all of the instructional information is usually embedded in the UI. As mobile devices become our predominant access method, embedded UA is becoming even more important, and more content is moving from external help systems to embedded UA. In this session, we will discuss best practices for writing, designing, opening, and customizing embedded UA. We will also discuss how to balance embedded and non-embedded UA content.

Writing guidelines

Provide examples



eloan.com – examples include "My spouse's name" and "Chris"

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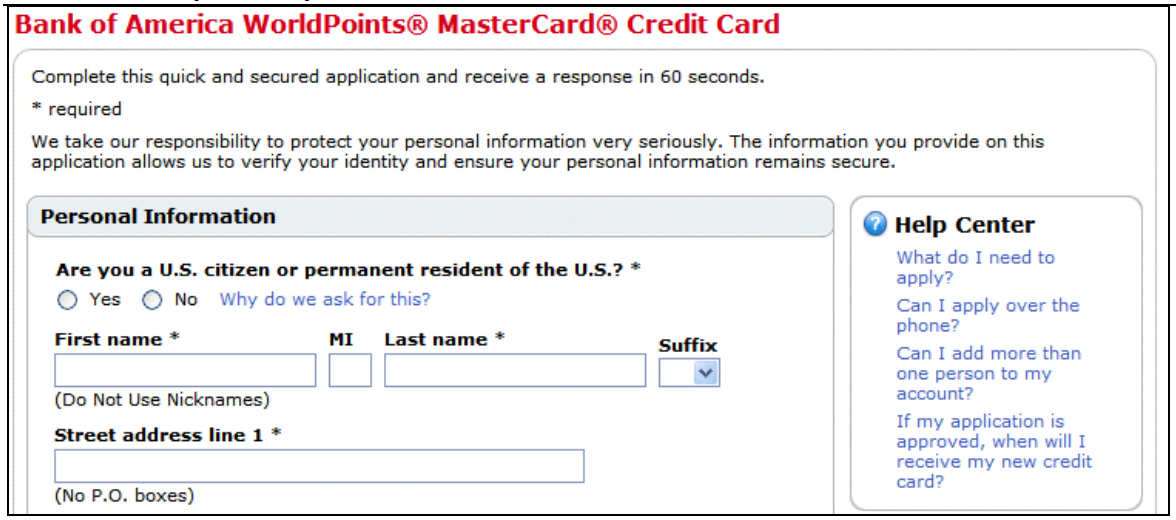
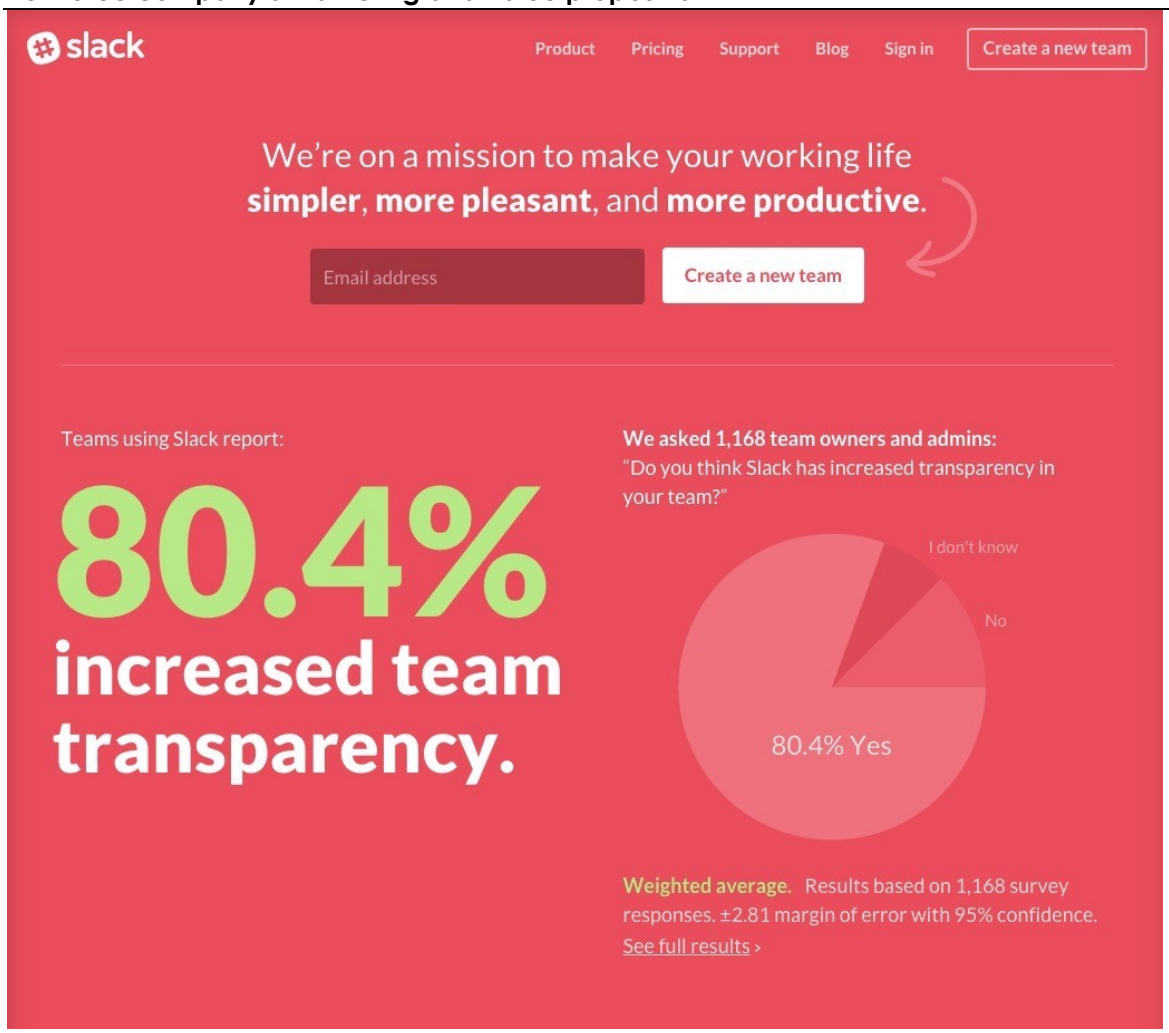
Persuade and predict questions



www.bankofamerica.com – overview text set expectations and establishes trust, "Help Center" predicts common user questions

Reinforce company's marketing and value proposition



www.slack.com – highlights key benefits of product (simple, pleasant, productive)

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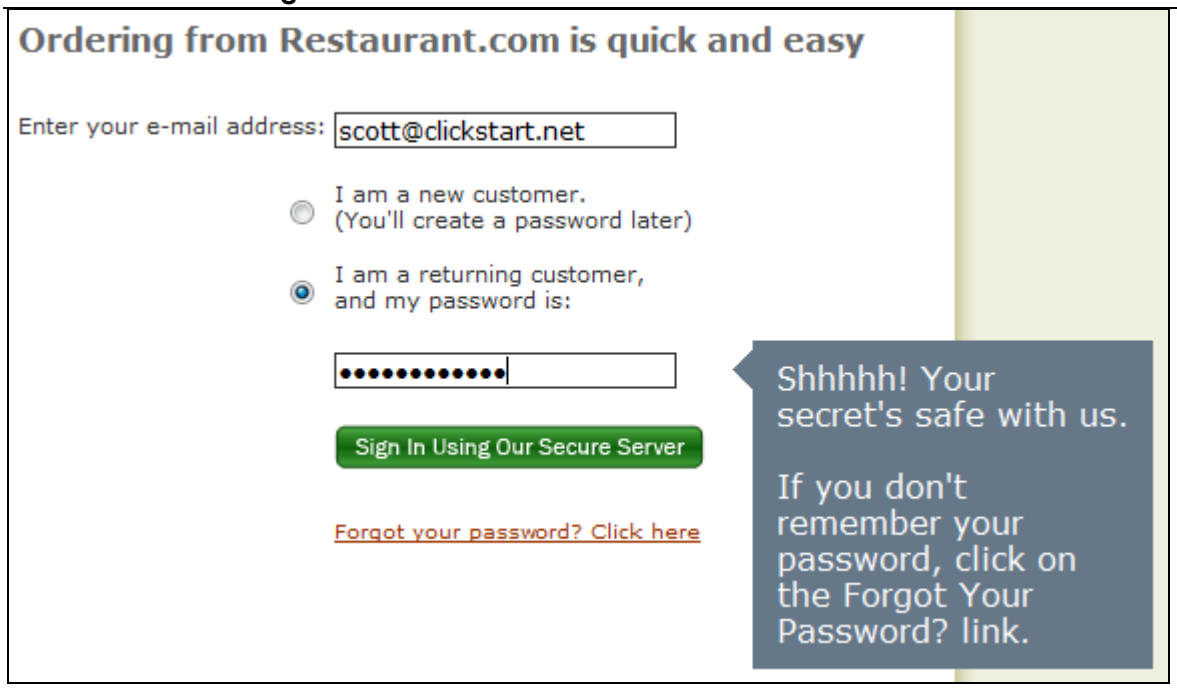
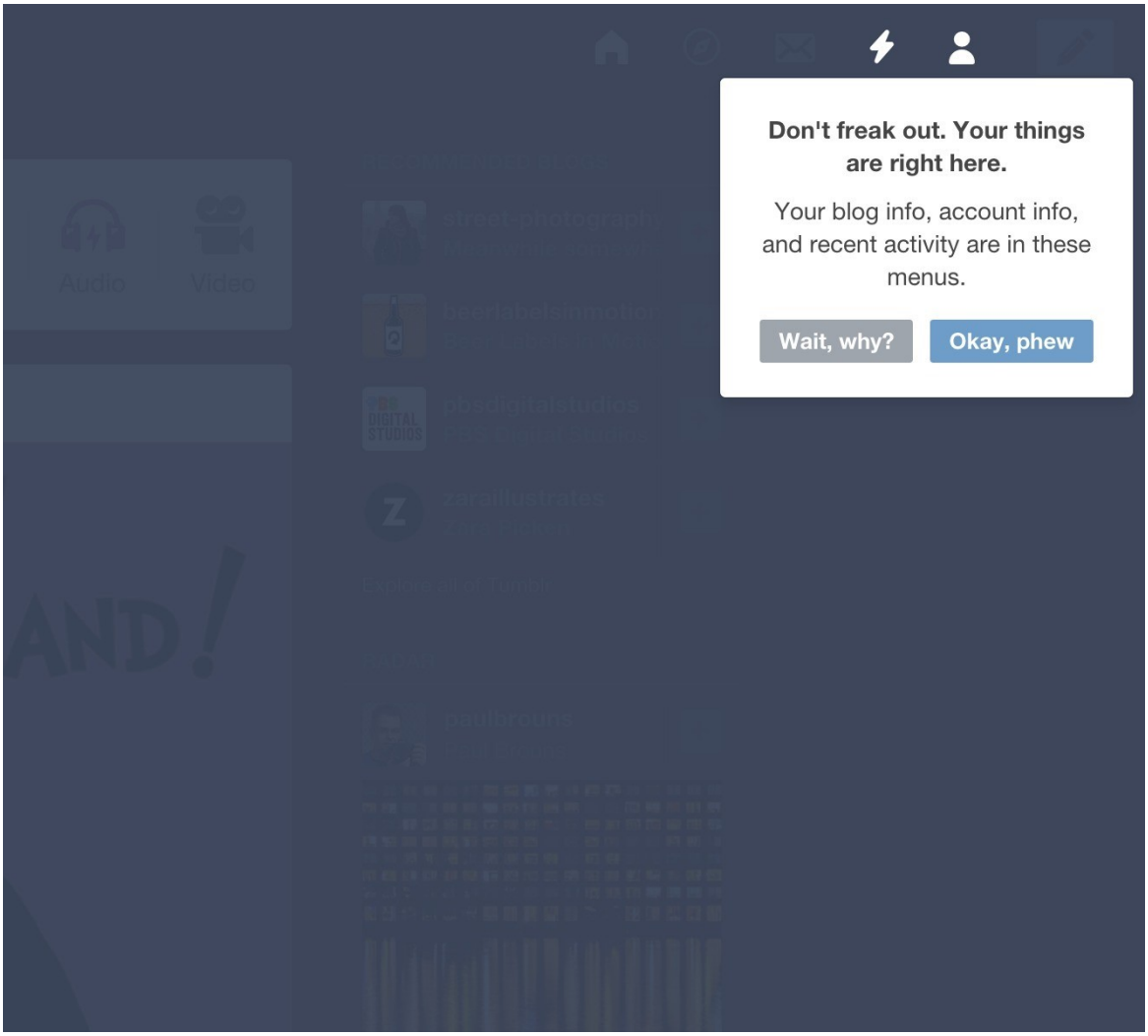
Remember that writing is a conversation



www.restaurant.com – uses an informal and friendly writing style to match their corporate image



www.tumblr.com – predicts user questions, very informal writing style

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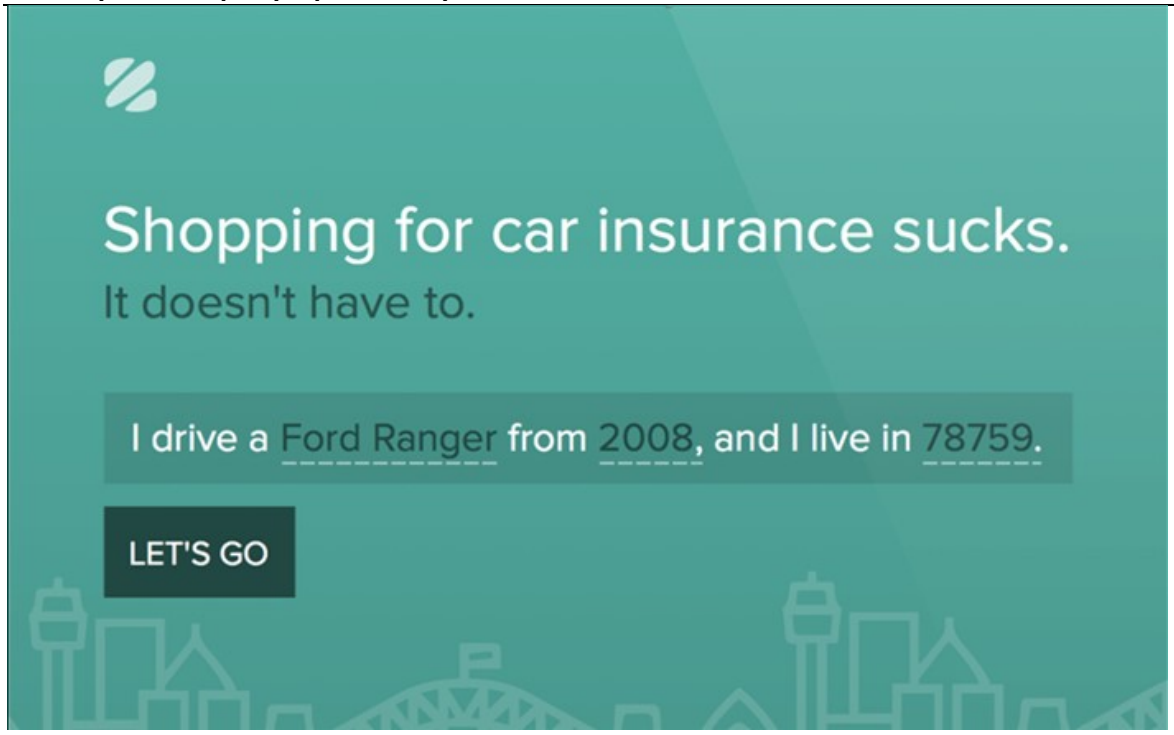
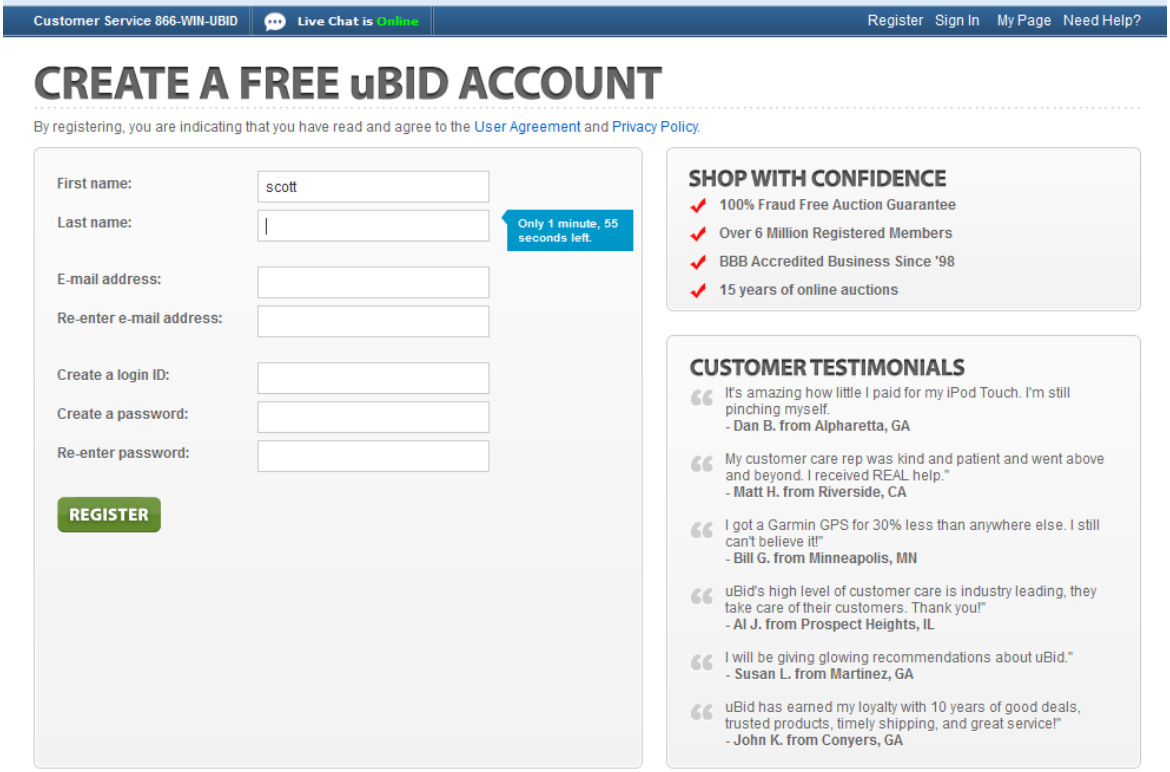
Match your company's personality



www.thezebra.com – initial design to match corporate style and amuse potential customers

Set user expectations



www.uBid.com – sets user expectation for time to sign up and updates as steps are completed

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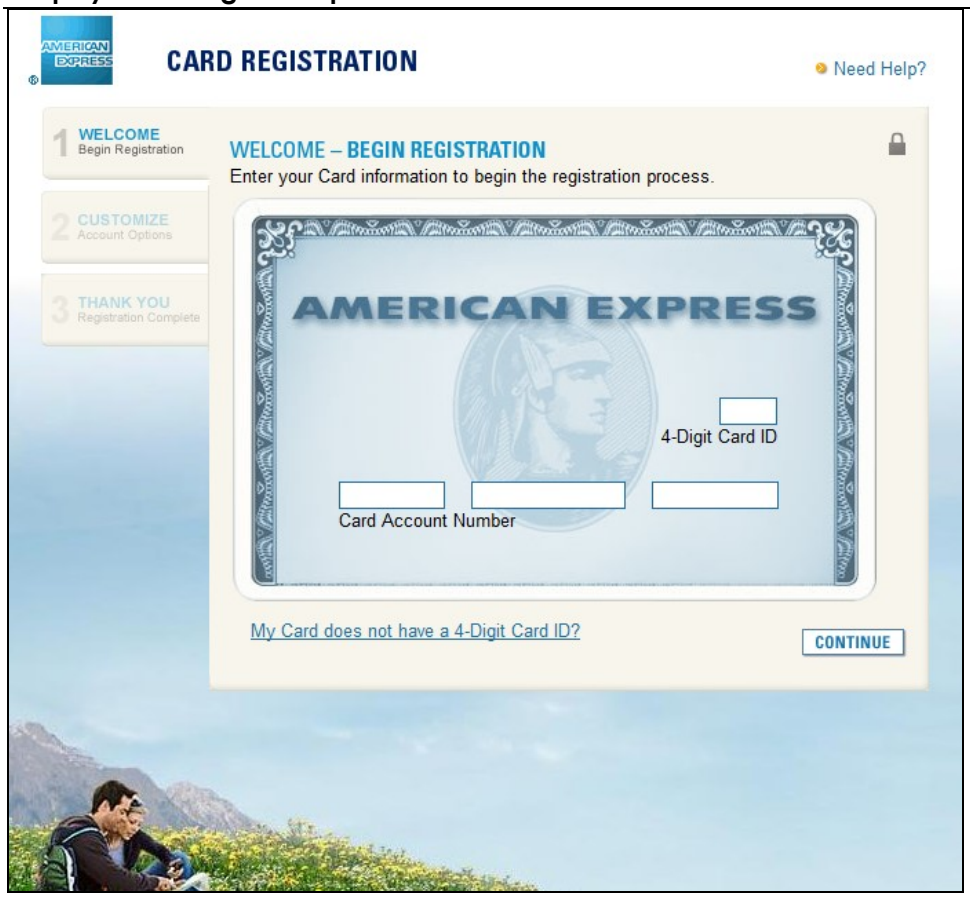
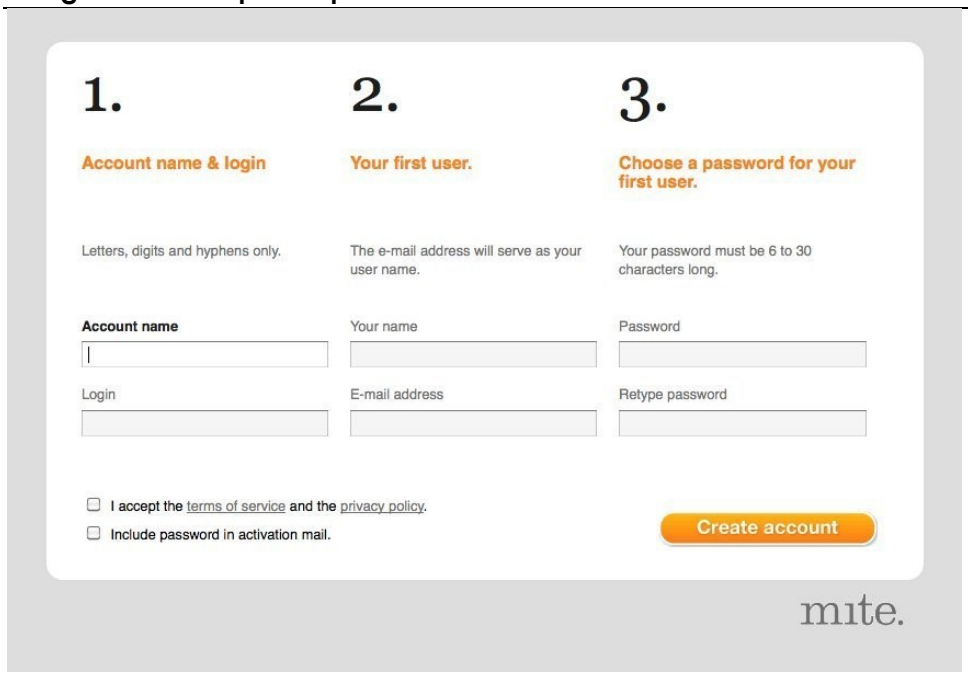
Design guidelines

Simplify confusing concepts and tasks



www.americanexpress.com – the design drastically increases task success

Design around steps in a process



www.mite.com – minimalist design clearly identifies steps

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Tonik healthcare (BlueCross/Blue Shield) – designed for millenials

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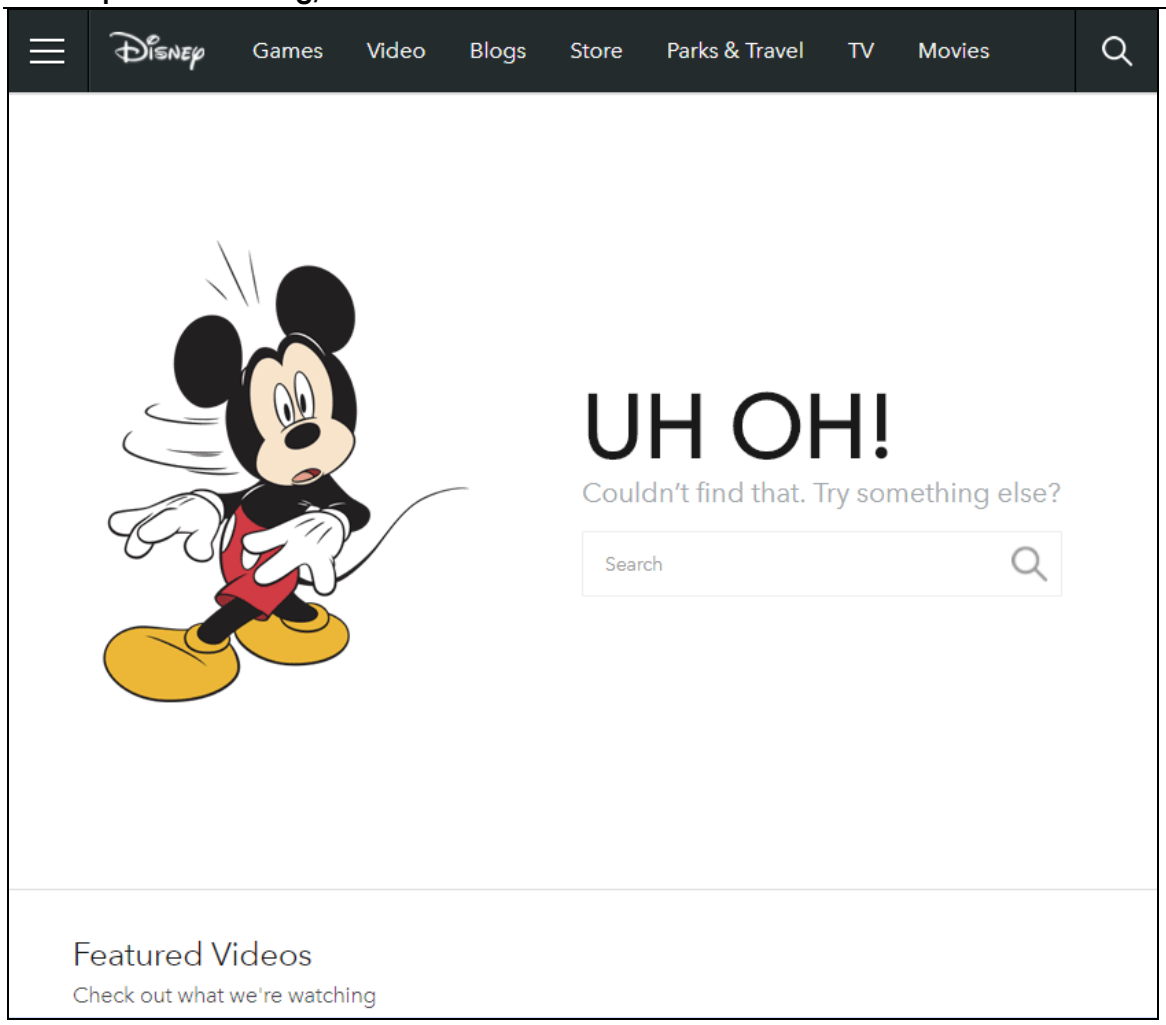
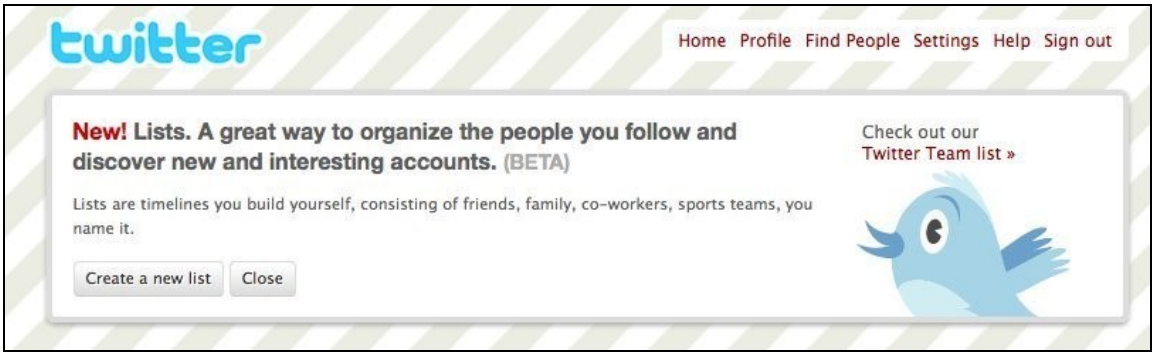
Use corporate branding/mascots



www.disney.com – 404 error page used Mickey Mouse to express user's confusion



www.twitter.com – new feature popup uses twitter mascot

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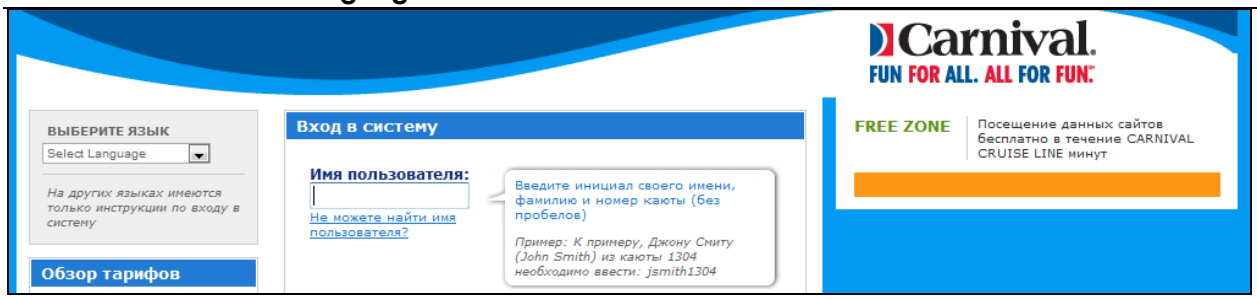
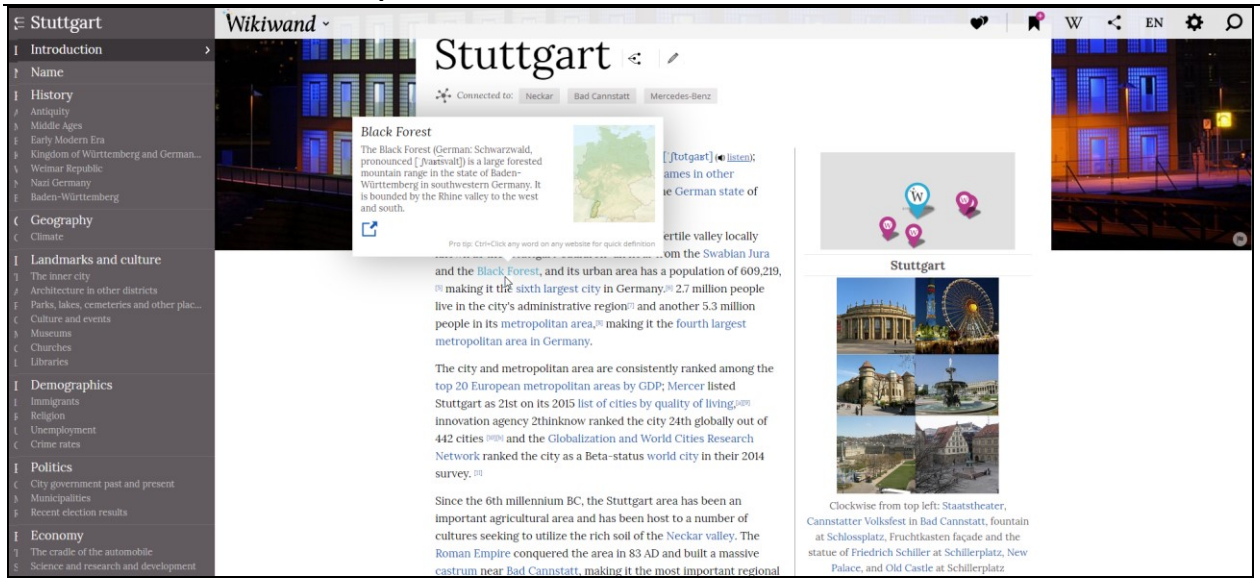
Customization guidelines

Allow users to select a language



www.carnival.com – allows user to translate content

Allow users to ask their own questions



www.wikipedia.org – with wikiwand, users can hover over links for link previews or Ctrl-click for definitions

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```
#wrap {
    margin: 0 auto;
    width: 800px;
}
```

Two Column Layout with Header and Footer

Once you have the basic centered layout, you can create a two column design using the same basic markup. All you need to do is add container divs for a header, content area, sidebar and footer. Make sure your main content is above your sidebar in the page hierarchy. The main content is more important and we want users that may have disabled CSS to see that information first. Add the four new divs inside the `wrap` container so that they stay inside the centered column. Here is the updated HTML:

```
<body>
    <div id="wrap">
        <div id="header">
        </div>
        <div id="content">
        </div>
        <div id="sidebar">
        </div>
        <div id="footer">
        </div>
    </div>
</body>
```

The CSS introduces two new properties: `float` and `clear`. The **content** and **sidebar** divs need to be floated left and right respectively and given fixed widths. Because both divs are now floating a `clear: both` property needs to be added to the `#footer` rule to push it below the content and sidebar.

siarto.com – use prism.js to auto-format code samples and provide a copy button

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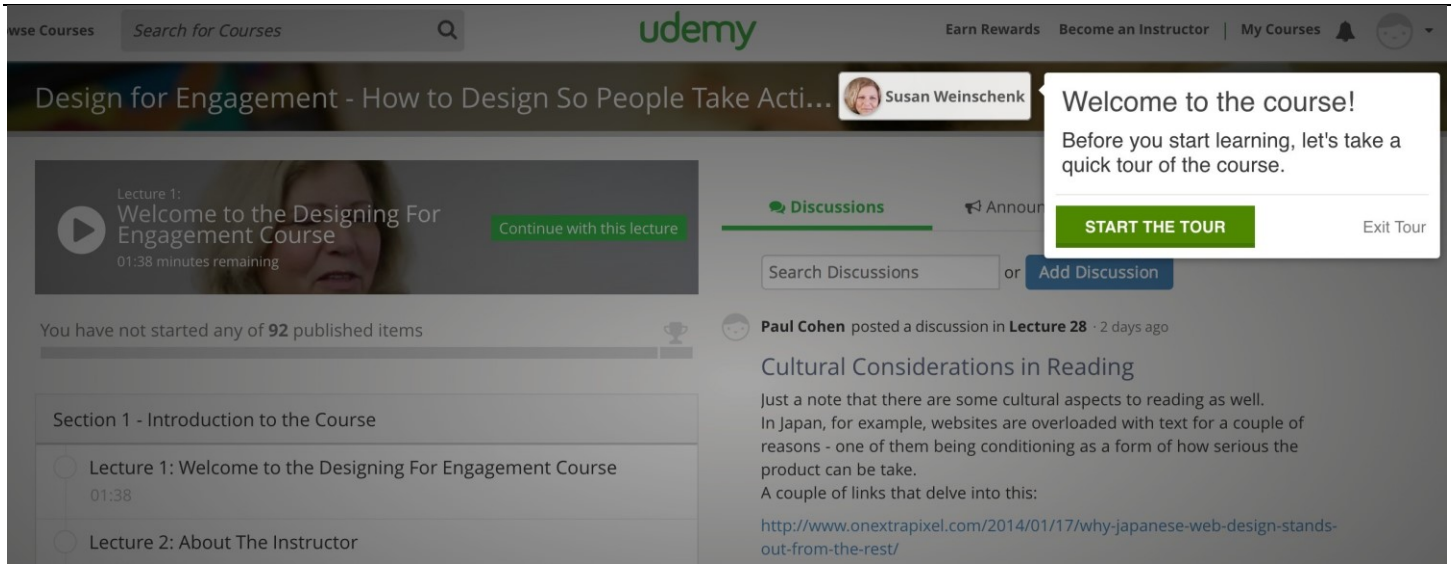
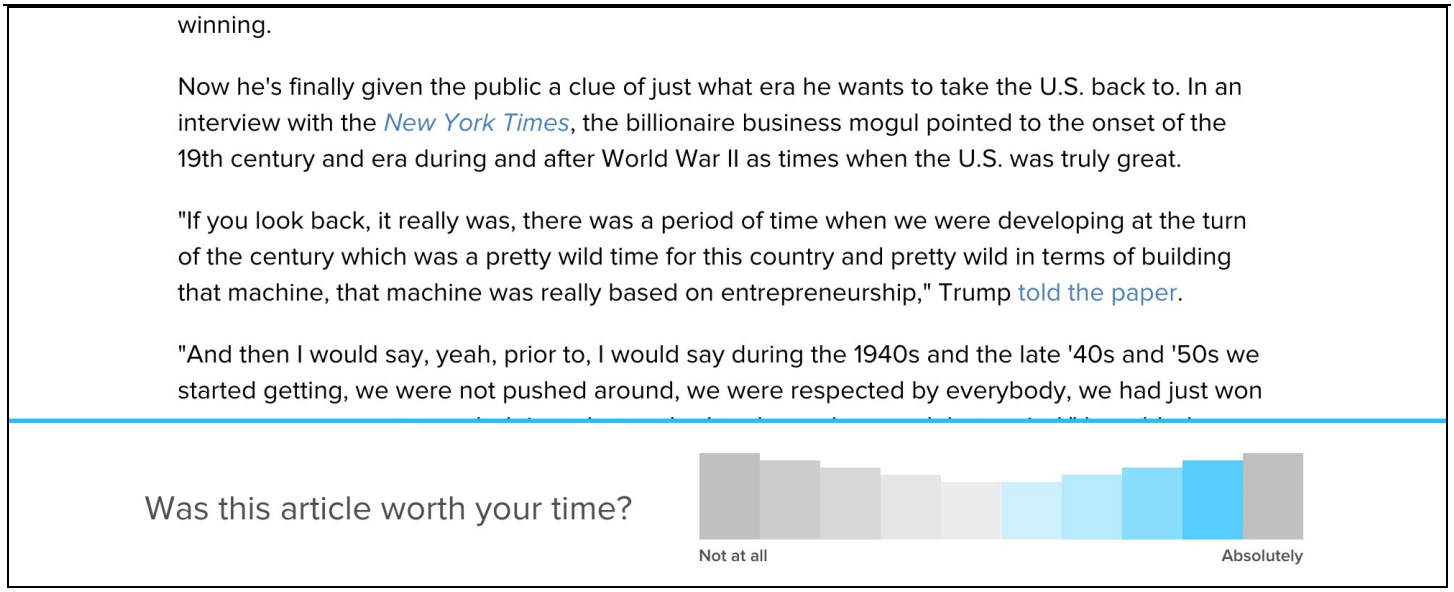
Allow users to turn off automatic user assistance



www.udemy.com – users easily exit tour

Allow users to rate content



www.mic.com – users can rate content with a color-coded scale

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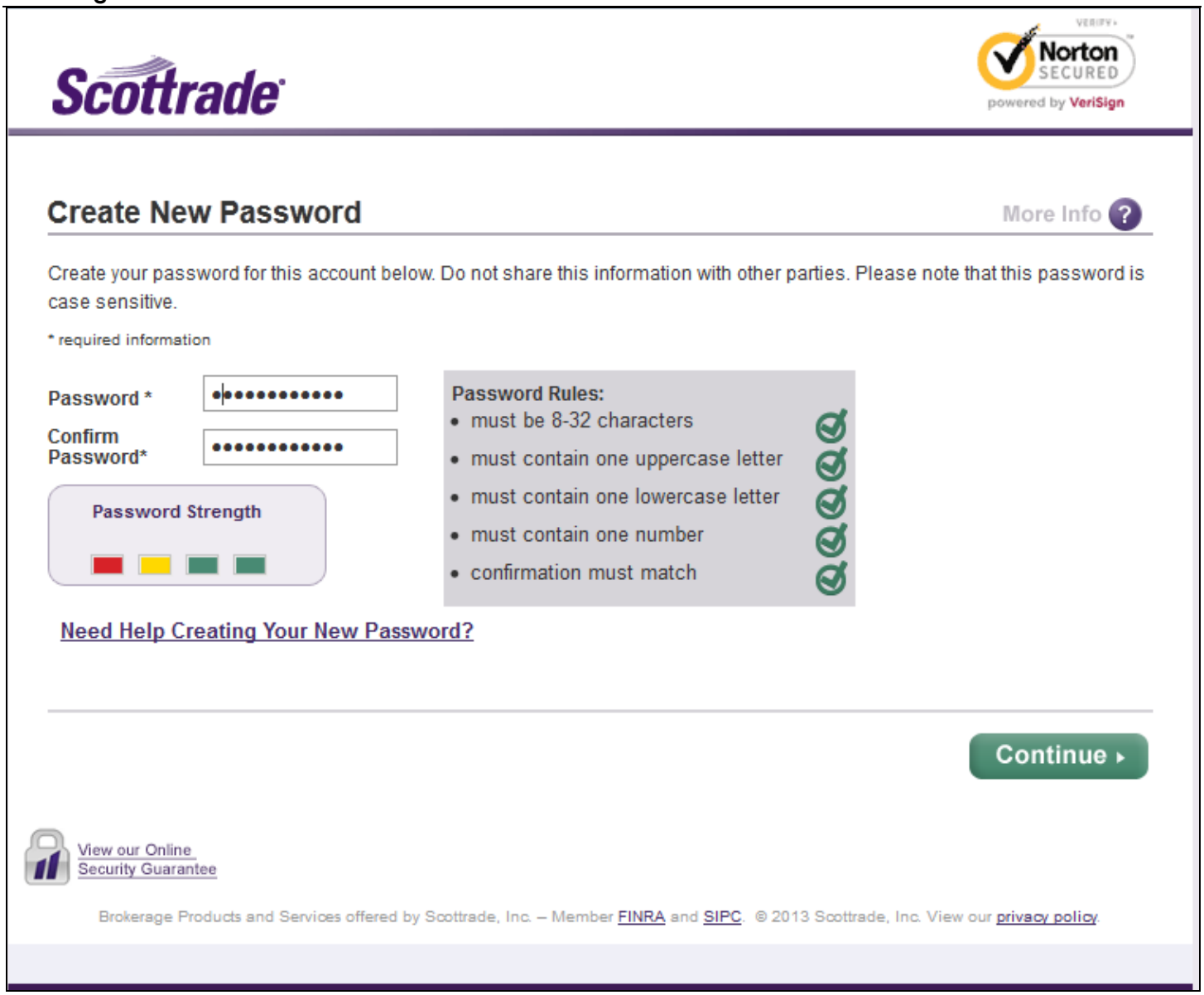
User learning guidelines

Encourage success



www.scottrade.com – requirements are checked off dynamically as they are met

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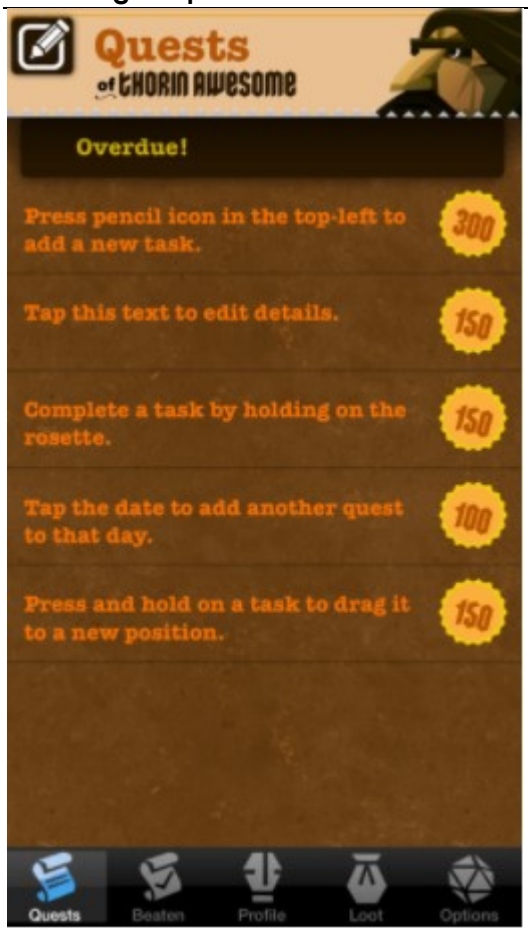
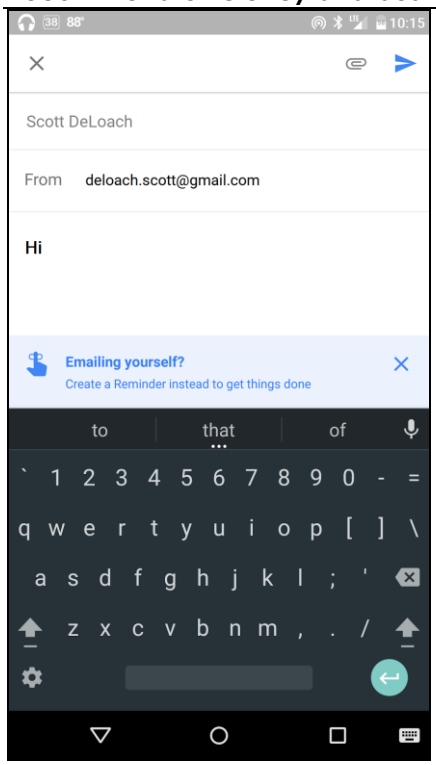
Encourage exploration



EpicWin iOS app – encourages users to use and explore the app

Recommend efficiency and best practices



Google Mail Android app – recommends new/advanced features

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Examples

Apps
EpicWin
Google Mail

Websites
www.americanexpress.com
www.bankofamerica.com
www.carnival.com
www.disney.com
www.mic.com
www.mite.com
www.restaurant.com
www.scottrade.com
www.siarto.com
www.slack.com
www.tonik.com (BlueCross)
www.thezebra.com
www.tumblr.com
www.twitter.com
www.ubid.com
www.udemy.com
www.wikipedia.org

About the presenter

Scott DeLoach is the Founder of Click**Start**, where he provides training and consulting for MadCap Flare, embedded user assistance, CSS, and HTML5. He has been developing browser-based help systems since 1997, and he has received four Best in Show awards for his work from STC.

Scott is a certified Flare and Doc-to-Help instructor, and he is the author of *MadCap Flare 2017: The Definitive Guide*, *CSS to the Point*, *HTML5 to the Point*, and *Word 2013 to the Point*. For more information about Scott's books see www.lulu.com/clickstart.

You can reach Scott at www.clickstart.net or by email at scott@clickstart.net.

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