Click**Start**

Best Practices for User Assistance (UA)

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Overview

- ☐ Formatting and writing guidelines
- ☐ Linking guidelines
- ☐ Best practice UA example
- ☐ UI label guidelines
- ☐ Error message guidelines
- ☐ UA link guidelines

Users use help

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Fact: 20% of users <u>admit</u> to using help daily.
59% of users <u>admit</u> to using help monthly.

- Martin et al. (2005)

Help **does** help

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Fact: Users are more successful if they use help.
   - Renkl (2002), Wood (2001), Wood & Wood (1999)

Fact: Users learn from help.
   - Renkl (2002), Wood (2001), Wood & Wood (1999)

Formatting and writing guidelines

- ☐ What font and font size work best?
- ☐ How do users use help?
- ☐ What are they looking for?

Use 12pt or 14pt type

Fact: Users have trouble reading text below 10pt.
   - Bernard, et al. (2003 and 2001d), Fukuda & Bubb (2003), Ownby et al. (2003), Schmidt, et al. (2003)

Fact: Users (esp. 65+) prefer 12pt or 14pt.
   - Bernard, et al. (2003 and 2001d), Fukuda & Bubb (2003), Ownby et al. (2003), Schmidt, et al. (2003)

Use Arial or Helvetica

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Fact: Users prefer Arial over Verdana and
Tahoma, especially Arial 14pt.

- Bernard, et al. (2001a, 2001b, 2001c)

Font comparison

Arial

After Estonia regained independence in 1991, a public debate ensued on the chosen English language name for Estonia. Many Estonians tend to identify more with Northern Europe, and would prefer the country to have a more Nordic-sounding name. The most widely-known of these alternative English language names is *Estland*.

Verdana

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Tahoma

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- www.wikipedia.org

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Fact: Users focus on minimizing effort rather than maximizing learning.

- Aleven, et al. (2006), Baker, et al. (2004)

Fact: Users are focused on their task and cannot focus on learning.

- Paas, et al. (2003)

Limit sentences to 20 words

Fact: Users scan—they do <u>not</u> read long sentences or paragraphs.

- Bailey (2000), Spool, et al. (1998)

Long vs short sentences

32 words

Iceland was one of the last large islands uninhabited by humans until it was discovered and settled by immigrants from Scandinavia and from Ireland and Scotland during the 9th and 10th centuries.

9 and 18 words

Iceland was one of the last uninhabited large islands. It was discovered and settled by immigrants from Scandinavia, Ireland, and Scotland during the 9th and 10th centuries.

- www.wikipedia.org

Fact: **Novices** use overviews to remember information and build knowledge.

Experts are slowed down by overviews and try to skip them.

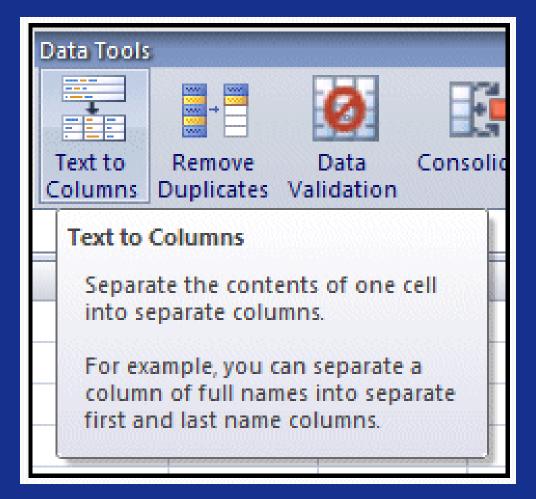- Kalyuga, et al. (2003), Kardash & Noel (2000)

Include examples

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Fact: Users learn from examples.
- Große & Renkl (2006)

Fact: Users want examples.
- Moallem (2003)

- "Super Tool Tips" in Microsoft Office 2007

Linking guidelines

- ☐ Where should links appear?
- ☐ What should links look like?

Position links on the first "screen"

Fact: Users spend 80% of their time on the first 'screen.'
- Fukuda & Bubb (2003), Bernard et al. (2001b),
  Bailey et al. (2000), Byren et. al. (1999)

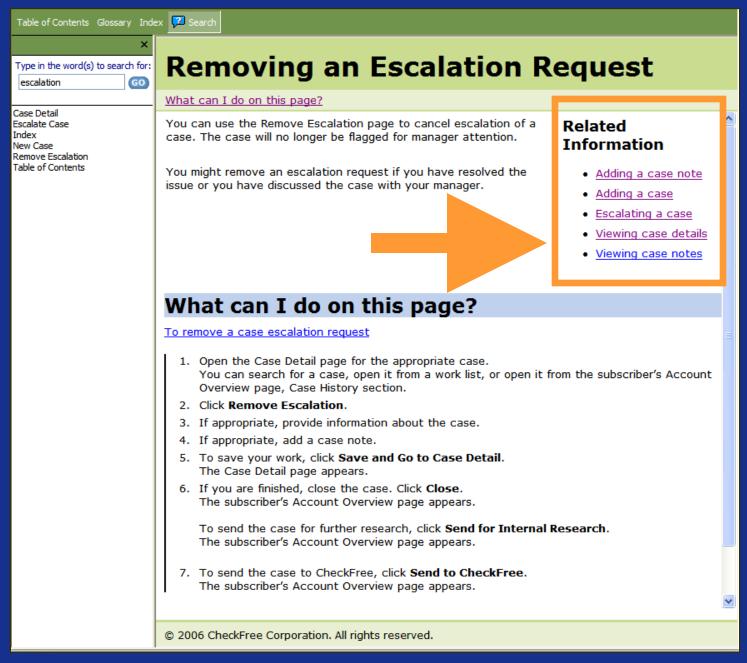**Fact:** Users do not prefer links to be placed at the bottom of the topic.
- Fukuda & Bubb (2003), Bailey et al. (2000),
  Bernard et al. (2001b), Byren et. al. (1999)

Provide links on the right side

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Fact: Users click on links in the right margin with more efficiency than topics on the left because they are closer to the scroll bar.

- Reuning (2004), McCarthy et al. (2003), Bailey (2000), Kalbach & Bosenick (2000)

Type in the word(s) to search for:

escalation   **GO**

Removing an Escalation Request

What can I do on this page?

You can use the Remove Escalation page to cancel escalation of a case. The case will no longer be flagged for manager attention.

You might remove an escalation request if you have resolved the issue or you have discussed the case with your manager.

Related Information

- Adding a case note
- Adding a case
- Escalating a case
- Viewing case details
- Viewing case notes

What can I do on this page?

To remove a case escalation request

1. Open the Case Detail page for the appropriate case.
   You can search for a case, open it from a work list, or open it from the subscriber's Account Overview page, Case History section.
2. Click **Remove Escalation**.
3. If appropriate, provide information about the case.
4. If appropriate, add a case note.
5. To save your work, click **Save and Go to Case Detail**.
   The Case Detail page appears.
6. If you are finished, close the case. Click **Close**.
   The subscriber's Account Overview page appears.

   To send the case for further research, click **Send for Internal Research**.
   The subscriber's Account Overview page appears.

7. To send the case to CheckFree, click **Send to CheckFree**.
   The subscriber's Account Overview page appears.

- CheckFree Corporation's PartnerCare help system

Use text links, not image links

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Fact: Users prefer text links, partially because
they change color.
- McElwain, et al. (2002), Spool, et al. (1998)

Fact: Users prefer text links to icon links.
- McElwain, et al. (2002)

Use descriptive link text

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Fact: Users can be confused by similar link labels.

- Miller & Remington (2004), Reuning (2004)

Identify link targets

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Fact: Users assume that a link goes to a new
page on the same site.

- Spool, et al. (1998)

- esdepo.gsfc.nasa.gov/docs

Best practice example

Getting the user's attention

Keep the overview short: one or two sentences.
If you have more content, let them expand it.
Tell me more…

To complete this task:
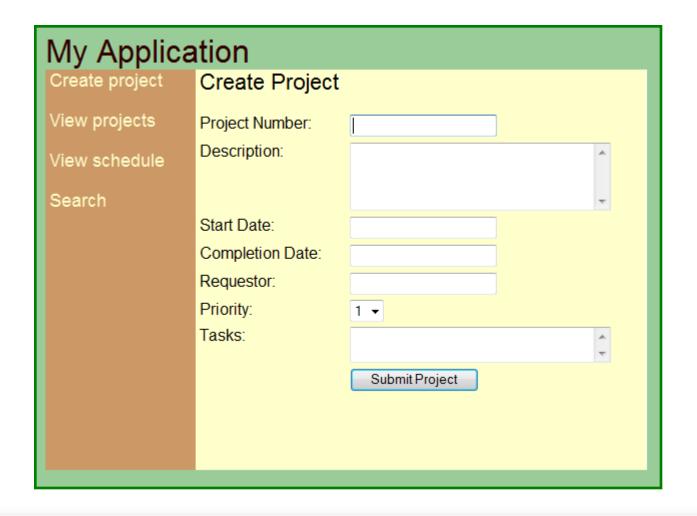
1. Open the xyz window.

2. Type a country. example: Germany

3. Click **OK**.

Tip: Tips can include shortcuts, details, or best practices.

Related topics

Creating seductive help links
Testing the user's knowledge
Providing options

Formatting required fields

My Application

Create project	**Create Project**
View projects	Project Number:
View schedule	Description:
Search	Start Date:
	Completion Date:
	Requestor:
	Priority: 1
	Tasks:
	Submit Project

Formatting required fields

Requestor: *

Requestor: *

Requestor:

Requestor:

Requestor:

Providing examples

Requestor:
first and last name

Formatting error messages

Please provide the following information:

- Project Number
- Requestor

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- Project Number
- Requestor

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- Project Number
- Requestor

Labeling UA links

Completion Date: [   ] *estimating tips*

Requestor: [   ] *can I request a project?*

- ☐ Quick tip…
- ☐ How do I….
- ☐ Tell me more…
- ☐ Why we need this information…

Formatting error messages

Questions?

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