

Observations on Software User Assistance

Matthew Ellison, UA Europe

Matthew Ellison

- In tech comms since 1986
(digital, digitext, WinWriters)
- Independent trainer and consultant on user assistance design and technologies
- Certified MadCap Flare instructor and consultant
- Regular contributor to ISTC's *Communicator* journal
- Amateur actor

The role of software user assistance

- develop understanding of key concepts
- provide an overview: the big picture
- answer questions
- provide instructions
- give hints and tips
- raise awareness of new and untried features
- suggest more efficient workflows and best practice

Examples...

Illumio technical information portal

[GET STARTED](#)[INSTALL AND UPGRADE](#)[USE ASP](#)[ADMINISTER](#)[DEVELOP](#)[TOOLS](#)[SUPPORT](#)[Home](#) > [Use ASP](#) > [Security Policy Guide](#) > [Security Policy Objects](#) > Labels and Label Groups

Security Policy Objects

Labels and Label Groups

[Services](#)[Virtual Services](#)[IP Lists](#)[Load Balancers and Virtual Servers](#)[Adaptive User Segmentation](#)[Export Reports](#)

Labels and Label Groups

The Illumio ASP policy model is a Label-based system, which means that the Rules you write don't require the use of an IP address or subnet, like traditional firewall solutions. You control the range of your policy by using Labels. This helps you categorize your Workloads more quickly and makes it easier to set up your policy.

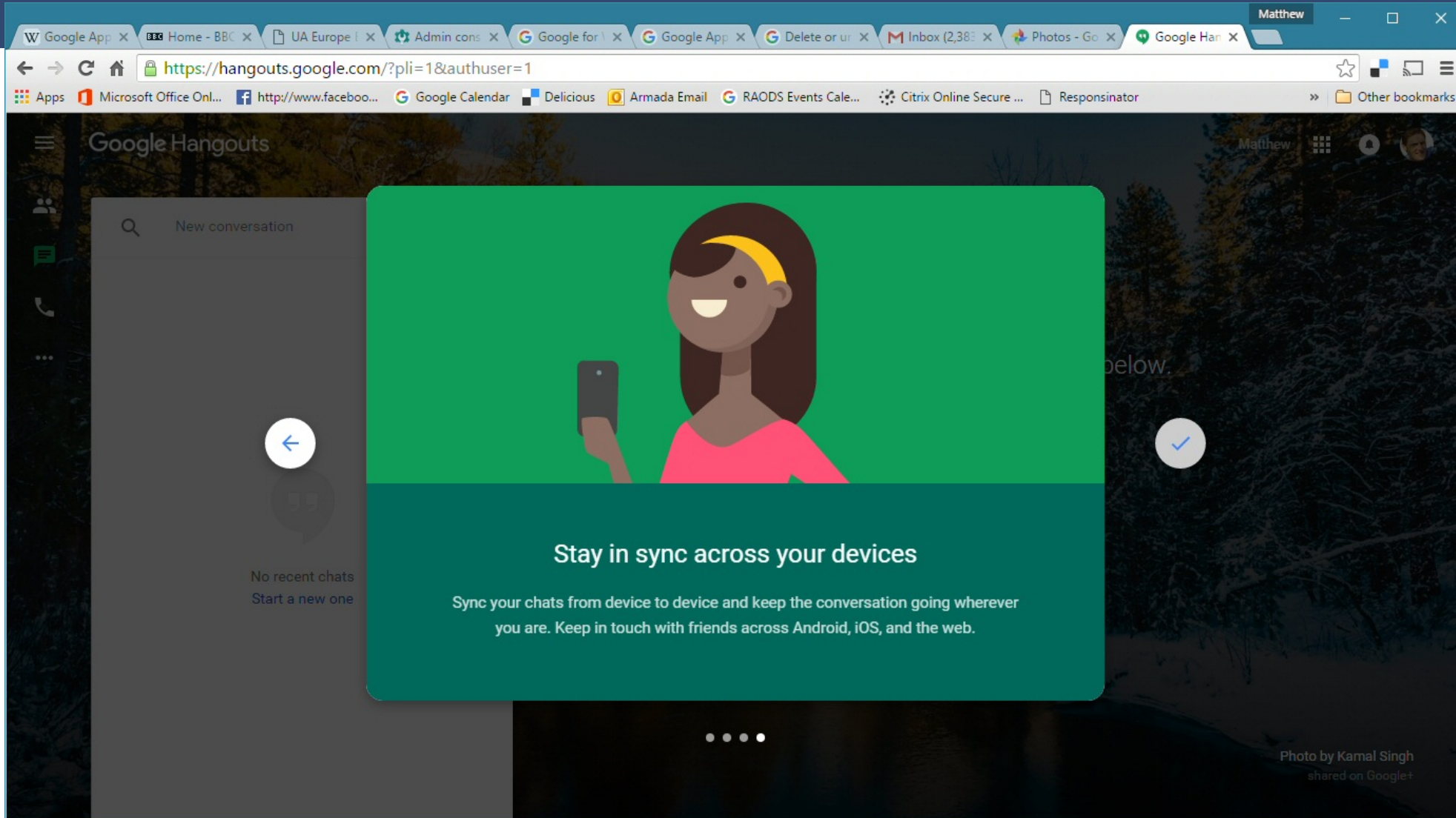
Label Types

Label	Description
Role 	<p>This Label type allows you to describe the 'role' (or function) of a Workload. In a simple two-tier application consisting of a web server and a database server, there would be two roles: Web and Database. You can use the same role as many times as you want in other Rulesets for different applications.</p> <p> NOTE: The Role Label cannot be used to define the Scope.</p>
Application 	<p>This Label type allows you describe the application that a Workload supports. If two servers in a two tier application have a relationship with one another because one provides a service (like a database) to another, they likely constitute an application.</p> <p>If an organization has 100 applications, and each application has a separate web role and separate database role, the application role separates each one of the Web and Database role.</p>
Environment	This Label type allows you to describe a Workload based upon its stage in

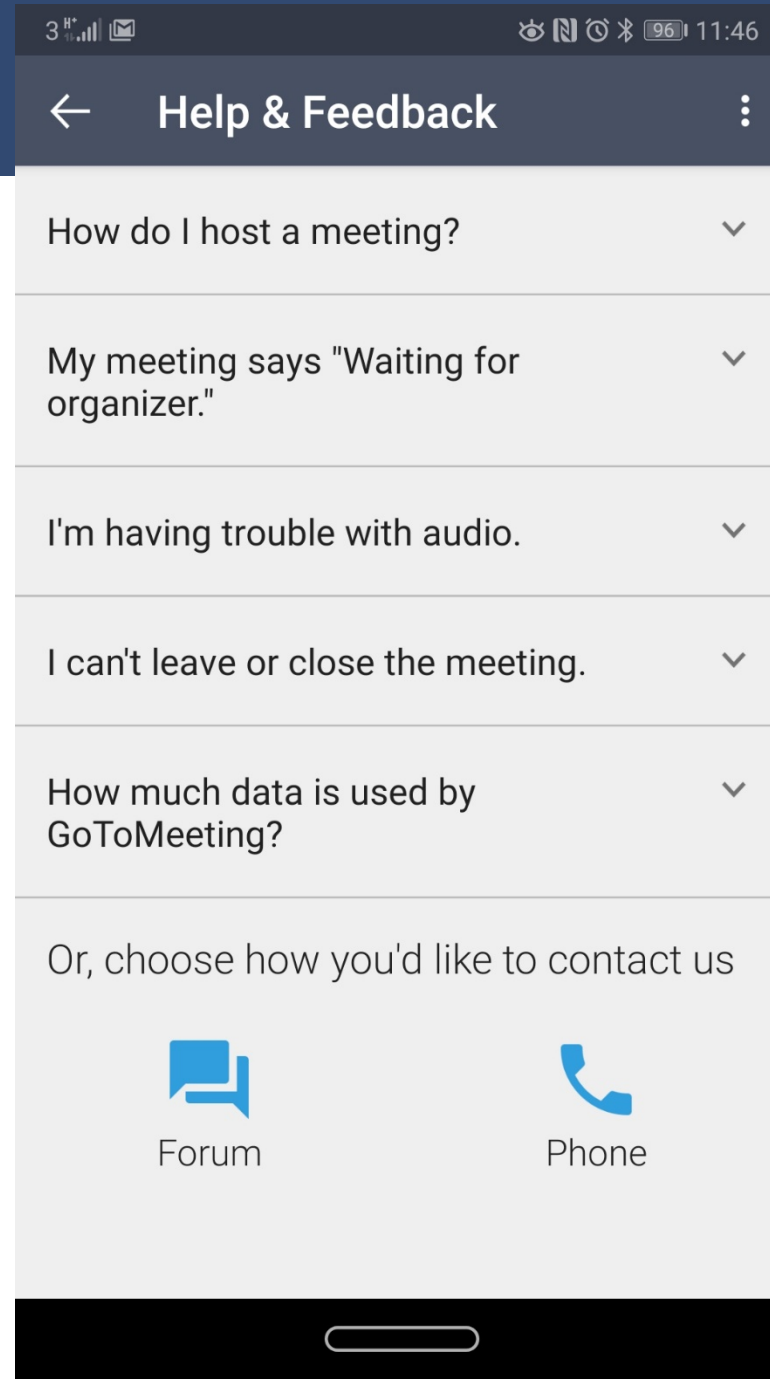
On this page:

[Label Types](#)[Additional Dimensions](#)[System Default "All" for Labels](#)[Default Labels](#)[Filtering Labels and Label Groups](#)[Create a Label](#)[Label Workloads](#)[Edit Labels for Multiple Workloads](#)[Label Groups](#)[Policy Calculation Using Label Groups](#)[Create a Label Group](#)[Use a Label Group in a Scope](#)[Use a Label Group in a Rule](#)

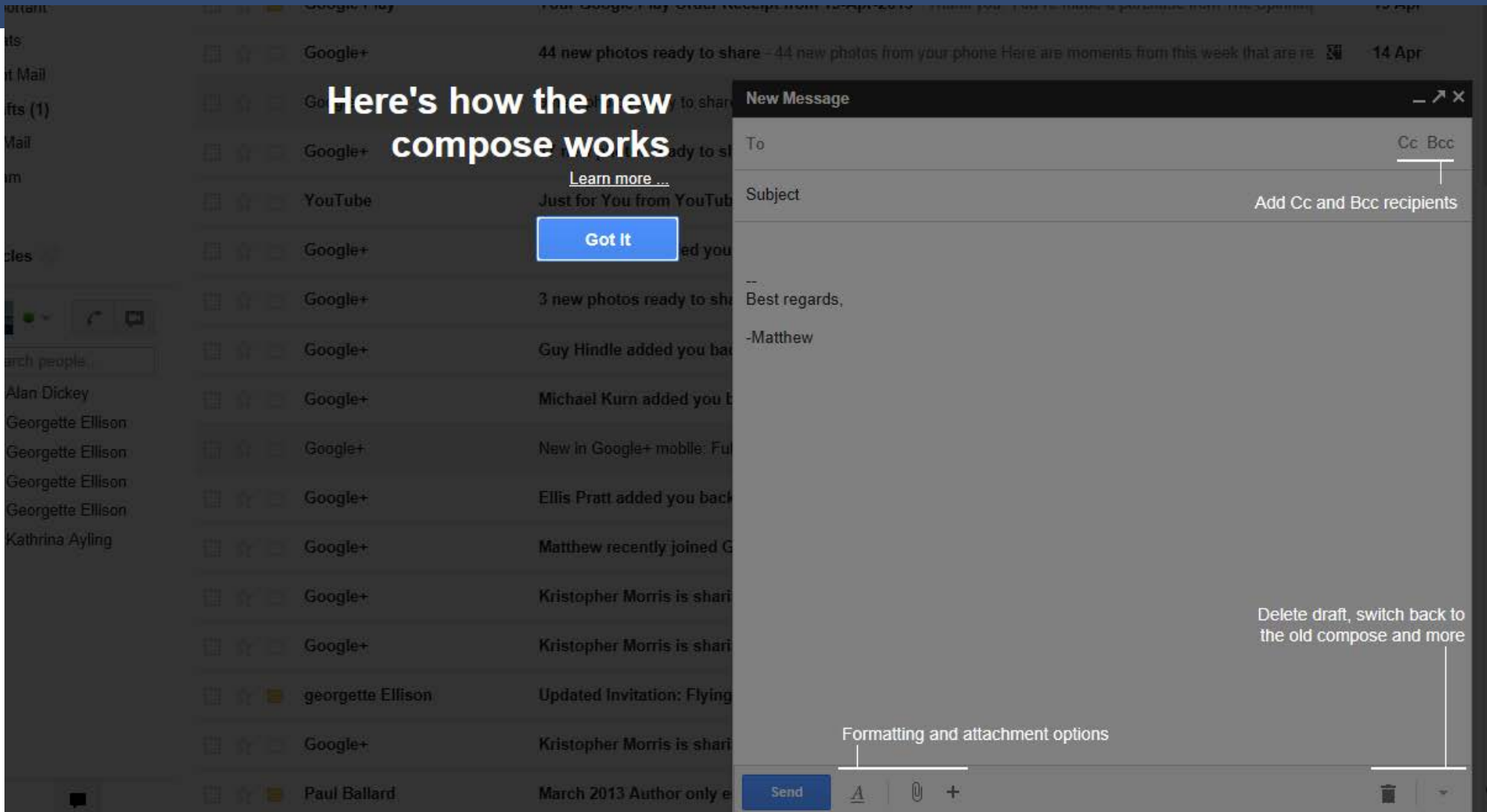
Google Hangouts



GoToMeeting



Overlay



UA Europe?

Embedded User Assistance

The screenshot shows a calendar application interface. At the top right, there is a user profile section with a grid icon and the email address "matthew@uaeurope.com". Below this, there are navigation buttons for "Day", "Week", "Month", "4 Days", "Agenda", and "More". A settings gear icon is also present. A red arrow points from a tooltip box to the settings gear icon. The tooltip box contains the text: "You'll find Settings and other useful stuff in this menu." The calendar grid below shows dates for "Thu 10/23", "Fri 10/24", and "Sat 10/25".

When people use software user assistance

- They have a question
- They have a problem
- It appears in front of them,
and offers some clear immediate value

When people don't use software user assistance

- It requires too much thinking
- It's easier to find the answer another way
- They have previous bad experience with Help
- It offers no clear or practical benefit

How people look for the information they need

■ Search

- Following links that have a strong "scent of information"



[Help](#)

[Related topics](#)

[Notes](#)



[Why is your date of birth required?](#)

[Backing up your data to the Cloud](#)

[Tips for adding multiple users more quickly](#)

Top three reasons for failure of UA

- Doesn't address the real needs/problems/questions of users
- Too much work to find the answers
- Content not clear and relevant

How do we find out about the real needs/problems/questions of users?

- Observation
- Testing
- Analytics

Example of testing (from 2017)

- Approximately five hours of observing user behaviour
- Seven participants
 - Friends and family
 - Mix of age and gender
- Focus on two issues
 - In-page navigation
 - Overall design and navigation (of a Help system)

Participants

1. Female 70-80
2. Female 60-70
3. Female 50
4. Male 17
5. Male 50-60
6. Female 15
7. Female 50-60

One area of investigation

Site navigation design patterns

Pattern 1 – Tripane window

The screenshot displays the MadCap Flare software interface, which is a tripane window. The top bar includes the MadCap Software logo, a search field, and a dropdown menu for "All Files". The left pane, titled "Contents", shows a hierarchical table of contents with "Welcome" selected. The middle pane displays the "Welcome" page content, including a list of features and expandable sections like "GETTING STARTED/MEET FLARE" and "PDF DOWNLOADS". The right pane is currently empty. The bottom of the interface features a "Search this Feed" box, a "Loading..." indicator, and an "Account" section with "Login" and "Register" links.

madcap software

Search All Files

Contents Index

Welcome

- What's New in this Version
- Basic Steps
- Key Features
- Videos
- PDF Guides
- Best Practices
- Tour of the Workspace
- How to Develop a Project
- How Did You Do That?
- Features
- User Interface Elements
- Troubleshooting
- Tips and Tricks from the MadCap Blog
- FAQs

You are here: Welcome

Welcome

Welcome to MadCap Flare—the first native XML content authoring application, which offers the following.

- Single-source XML authoring
- Multi-channel publishing for the Web, desktop, print, and mobile devices
- A flexible, open-architecture; you can edit files outside of Flare
- Full support for left-to-right (LTR) as well as right-to-left (RTL) languages
- Knowledge of XML or HTML not required

+ GETTING STARTED/MEET FLARE

+ WHERE DO I BEGIN?

+ THE MOST IMPORTANT THINGS IN FLARE

+ WHAT'S NEW

+ EXTERNAL RESOURCES

See Also

+ PDF DOWNLOADS

+ VIDEO

+ SUPPORT LINKS

+ FOLLOW THE DOC TEAM

+ COMPANY INFORMATION

+ PRODUCT INFORMATION

Search this Feed

Loading...

Account

Login Register

Key features of Pattern 1

- Left-hand navigation pane:
 - TOC
 - Index
 - Glossary
- Search box in top right corner
 - Default Boolean OR
- Breadcrumbs

Pattern 2 – Top navigation

madcap
FLARE
2017 r2

Search

You are here: [Features](#) > [Output](#)

Output

Following are the most important things to know about producing output from Flare.

- ▶ OUTPUT TYPES
- ▶ TARGETS
- ▶ CONDITIONS
- ▶ BUILDING AND DISTRIBUTING OUTPUT
- ▶ EXPORTING PROJECTS
- ▶ MERGING PROJECTS
- ▶ PRINT-BASED OUTPUT

Features

- Editor Tools
- Elements and Objects
- Importing
- Language Support
- Managing Your Project
- Output**
 - Output Types
 - Targets
 - Conditions
 - Building and Publishing Output
 - Exporting Projects
 - Merging Projects
 - Print-based Output
 - Additional Output Tasks and Features
- Search
- Styling, Formatting, and Skins
- Additional Features

Key features of Pattern 2

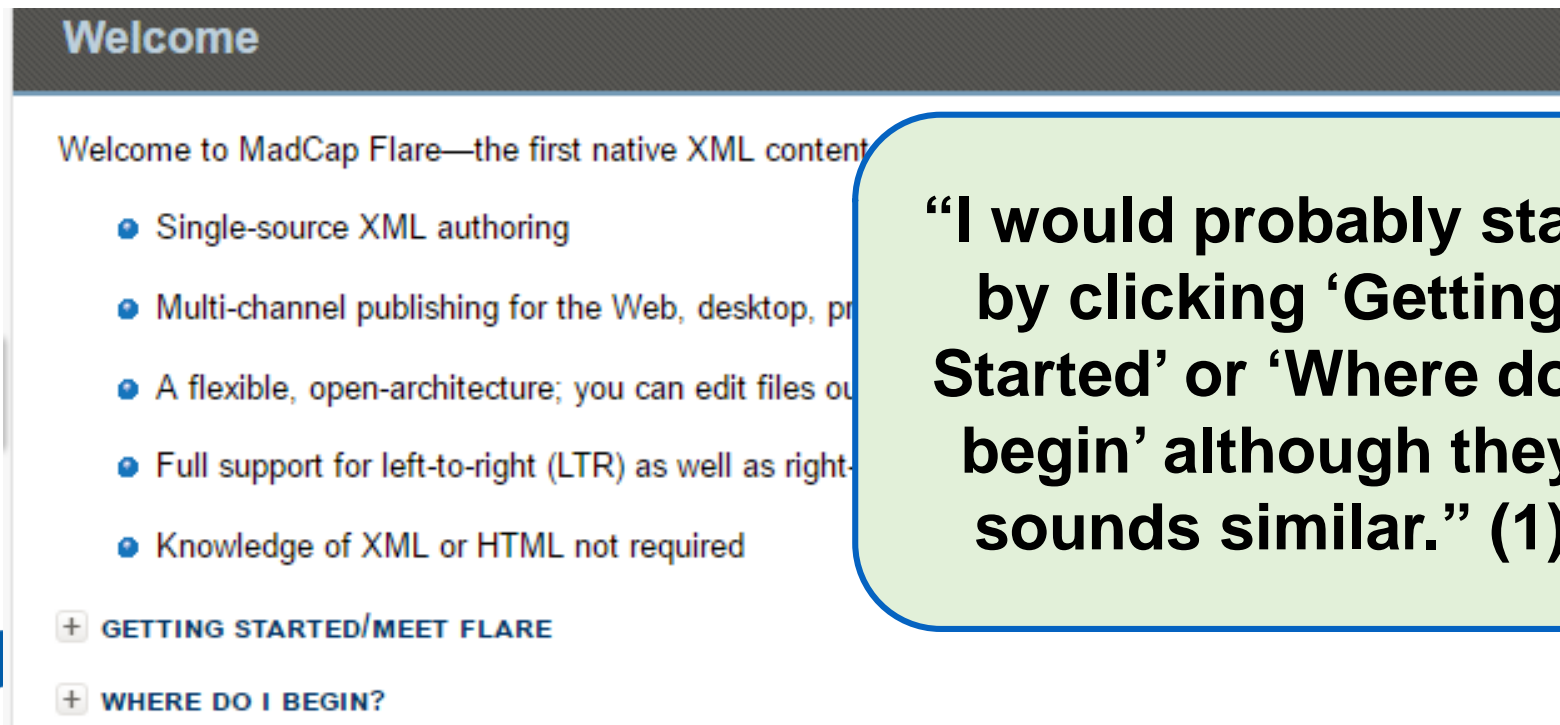
- Drop-down menus at top (TOC)
- No index
- Glossary definition displayed at top of search results
- Search box
 - In middle of home page
 - In top-right corner of other pages
 - Default Boolean AND
- Breadcrumbs
- Side navigation menu

Key finding

Preference for Getting Started information

“How do you add a Master Page to a project?”

“Would it tell me in Getting Started?” (2)



The screenshot shows the 'Welcome' page of MadCap Flare. It features a dark grey header with the word 'Welcome' in white. Below the header, the text reads 'Welcome to MadCap Flare—the first native XML content...'. A bulleted list follows, listing features such as 'Single-source XML authoring', 'Multi-channel publishing for the Web, desktop, pr...', 'A flexible, open-architecture; you can edit files ou...', 'Full support for left-to-right (LTR) as well as right-', and 'Knowledge of XML or HTML not required'. At the bottom, there are two expandable sections: '+ GETTING STARTED/MEET FLARE' and '+ WHERE DO I BEGIN?'.

“I would probably start by clicking ‘Getting Started’ or ‘Where do I begin’ although they sounds similar.” (1)

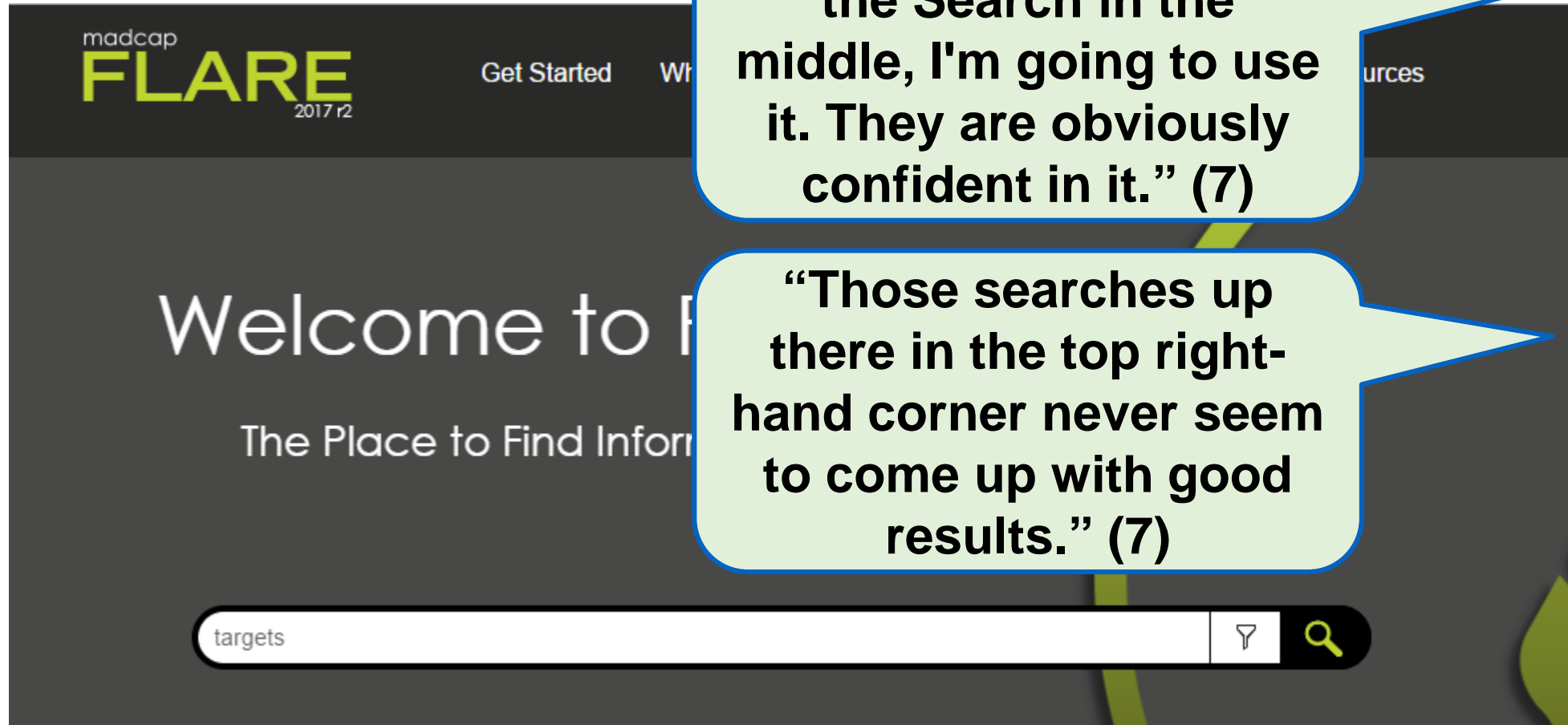
Lessons learned

- Provide clear signposting to “Getting Started” information for new users
- Include links from this information to more detailed/advanced information

Key finding

The Fragility of search

“What is a Target?”



“As they've presented the Search in the middle, I'm going to use it. They are obviously confident in it.” (7)

“Those searches up there in the top right-hand corner never seem to come up with good results.” (7)

targets



Your search for "targets" returned 968 result(s).

Building Output Using a Batch Target

Use the following steps if you want to generate and/or publish one or multiple targets in a batch from an example. Let's say you have a project with 17 targets and you need to build and publish 12 of those targets.
[Output/Flare/Building-Output-Using-Batch-Target.htm](#)

Changing the Output Type for a Target

Each target in your project is based on one of the output types that is available in Flare (Adobe FrameMaker, Adobe PDF, Clean XHTML, DITA, DotNet Help, Eclipse Help, EPUB, Microsoft HTML Help, HTML5, Microsoft Word, Microsoft XPS, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus). If you want a ...
[Targets/Flare/More/Changing-Output-Type-for-Target.htm](#)

Specifying the Output File and Folder in a Target

When you build the output for a target in your project, Flare sends the output files to the Output folder where your project is located. It also uses a default name for the main entry file to the output. However, you can specify a different location and main entry file name for a target's output ...
[Targets/Flare/More/Specifying-Output-File-Folder-in-Target.htm](#)

Associating Skins with Targets

Outputs Supported After you add a skin to your project and edit the settings, you can associate it with a target. After you build the target, the output will be displayed in the skin. For HTML5 targets, you can also tell Flare not to use any skin at all. how to associate a skin with a target Open ...
[Skins/Flare/Associating-Skins-with-Targets.htm](#)

About Building and Publishing Output

About Building and Publishing Output After you have created a project, added and formatted content, you can build the output. Of course, you can build the output at any point during the development process, but if you make changes to the content, you should rebuild the output.
[Output/Flare/About-Building-Output.htm](#)

Associating a Search Filter Set with a Target

Instructions for how to associate a search filter set with a MadCap Flare target using the Advanced Search.
[Search/Flare/Search-Filter-Sets/Associating-Search-Filter-Set-with-Target.htm](#)

About Targets

About Targets Targets There are several types of online output and print-based output that you can use. print-based output, PDF and Word are preferred. Each output type has its own set of advantages.
[Targets/Flare/About-Targets.htm](#)

“I’m not impressed!” (7)

“If I hadn't seen ‘About Targets’ at the bottom of the list, I would have given up.” (7)

“What is a Target?”

Get Started What's New? Features Interface Tutorials Resources

what is a target

Your search for "what is a target" returned 390 result(s).

[Building Output Using a Batch Target](#)

Use the following steps if you want to generate and/or publish one or multiple targets in a batch from the user interface, perhaps scheduled to run at a specific time. example example Let's say you have a project with 17 targets and you need to build and publish 12 of those targets at the beginning ...
[Output/Flare/Building-Output-Using-Batch-Target.htm](#)

[About Building and Publishing Output](#)

About Building and Publishing Output After you have created a project, added and formatted content, and developed a target, you are ready to build and publish the final output. Of course, you can build the output at any point during the development process, but if you make additional changes to ...
[Output/Flare/About-Building-Output.htm](#)

[Enabling WebHelp Plus Output](#)

Enabling WebHelp Plus Output If you want to take advantage of the advanced server-side search, searching of non-XHTML files), you must enable WebHelp Plus Output.
[Output/Flare/WebHelp-Plus-Output/Enabling-WebHelp-Plus-Output.htm](#)

[Enabling HTML5 Server-based Output](#)

Enable server-based functions in an HTML5 Help system created with MadCap Flare.
[Output/Flare/HTML5-Output/Enabling-HTML5-Server-Output.htm](#)

[What's New?](#)

Find out what's new in the latest version of Flare.
[Introduction/Flare/Whats-New-Flare.htm](#)

[Associating Conditions with Targets](#)

Basic and advanced methods for associating condition tags in topics with the Condition-Tags/Flare/Associating-Condition-Tags-with-Targets.htm

[Viewing Output](#)

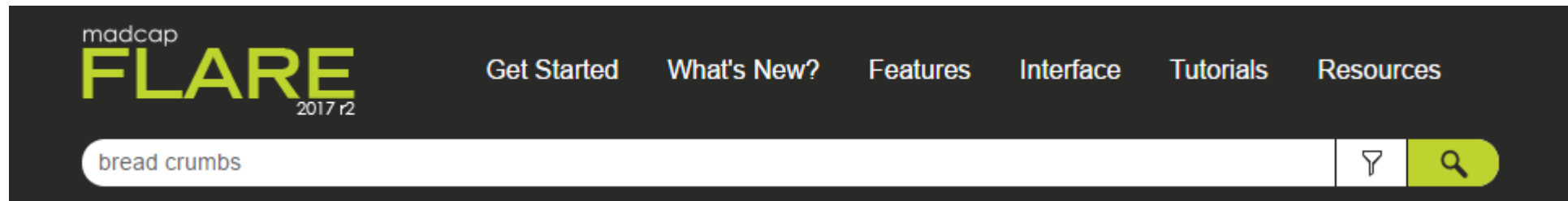
View the build output for projects generated with MadCap Flare. Learn the steps for viewing the build output.
[Output/Flare/More-Building-Output/Viewing-Output.htm](#)

[Applying Conditions for Print-based Output](#)

“That didn't work” (4)

Proceeded to find answer using Top Nav menus

“How do you change the presentation/format of breadcrumbs?”

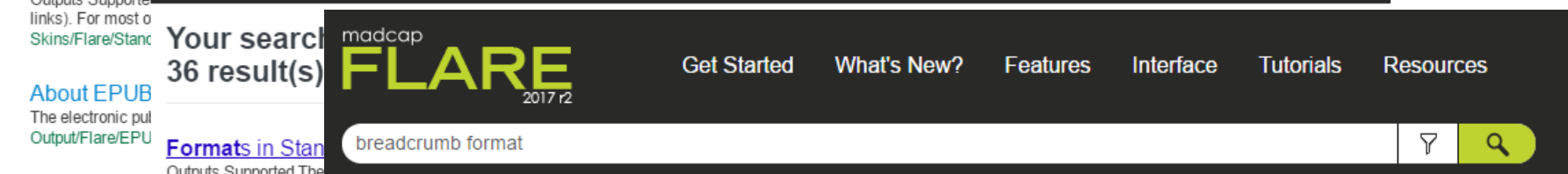
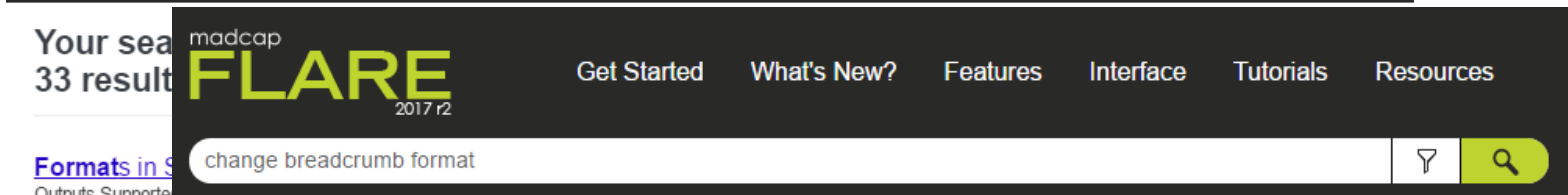
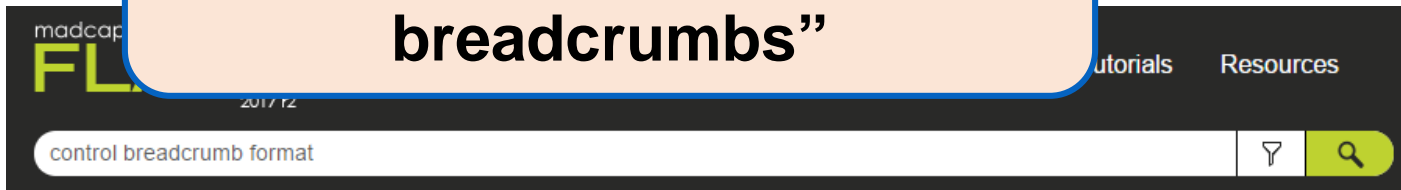


Your search for "bread crumbs" returned 0 result(s).

“Ah - zero results” (4)

Gave up after briefly exploring the Top Nav menus for ‘bread crumbs’

“How do you change the presentation/format of breadcrumbs”



Your search for "breadcrumb format" result(s).

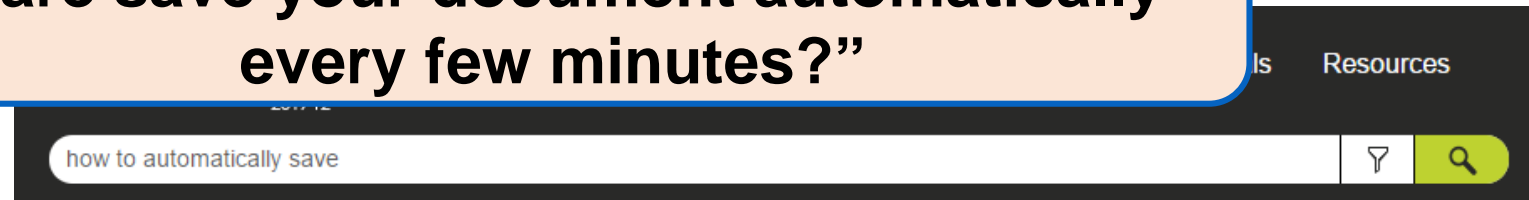
- [Formats in Standard Skins](#)
Outputs Supported These are navigation elements that you might include in your help content (such as navigation links). For most of these elements, you can use the skin style to change the look and feel of the element.
[Skins/Flare/Standard-Skins/Formats-Standard-Skins.htm](#)
- [About EPUB Output](#)
The electronic publication (EPUB) format is a standard format for digital publications. You can generate the EPUB format with MadCap Flare.
[Output/Flare/EPUB-Output/About-EPUB-Output.htm](#)
- [About WebHelp AIR Output](#)
Learn all about the WebHelp AIR format type. MadCap Flare lets you publish content in the AIR format.
[Output/Flare/WebHelp-AIR-Output/About-WebHelp-AIR-Output.htm](#)
- [About WebHelp Output](#)
The WebHelp output type in MadCap Flare is a Help format that runs on almost any browser.
[Output/Flare/WebHelp-Output/About-WebHelp-Output.htm](#)
- [About Master Pages](#)

“None of the results seem useful” (5)

Gave up



“How do you turn on the option that makes Flare save your document automatically every few minutes?”



Your search for "how to automatically save" returned 287 result(s).

[Specifying How Online Features are Converted in Printed Output](#)

Define how MadCap Flare converts online text and popup effects when building a print-based target.
[Output/Flare/Printed-Output/Specifying-How-Online-Features-Converted-Printed-Output.htm](#)

[Automatically Set the Title for a Browse Sequence Entry](#)

Setting up a title for a browse sequence, naming the browse sequence, and using an automatic name for a browse sequence.
[Browse-Sequences/Flare/More/Automatically-Set-the-Title-for-a-Browse-Sequence-Entry.htm](#)

[Automatically Set the Title for a TOC Entry](#)

You can automatically set the name of the TOC entry as the title for the topic in the output. This overrides the title that you may have provided for the topic in the Properties dialog for that topic. The display title is used in the following situations. Help Control Links The title displays as a ...
[TOCs/Flare/More/Automatically-Set-Title-for-TOC-Entry.htm](#)

[Window Layouts](#)

Working with Window Layouts. How to save, auto-save, select, reset, reload, and delete the Window layouts for the user interface.
[Interface/Shared/Window-Layouts.htm](#)

[Specifying the Order of Automerged HTML5 Outputs](#)

How to automatically merge HTML5 Help output in a specified order. Learn how to override the default merge configuration.
[Output/Flare/HTML5-Output/AutoMerge/Specifying-Order-Auto-Merged-Outputs-HTML5.htm](#)

[Chunking Large Search Database Files](#)

Describes how MadCap Flare builds chunk files for search.
[Search/Flare/Configuring-Search-Database/Chunking-Large-Search-Database-Files.htm](#)

[Using the Find and Replace in Files](#)

Using the Find in Files Feature, finding files, find and replace.
[Find-Replace/Shared/Using_the_Find_and_Replace.htm](#)

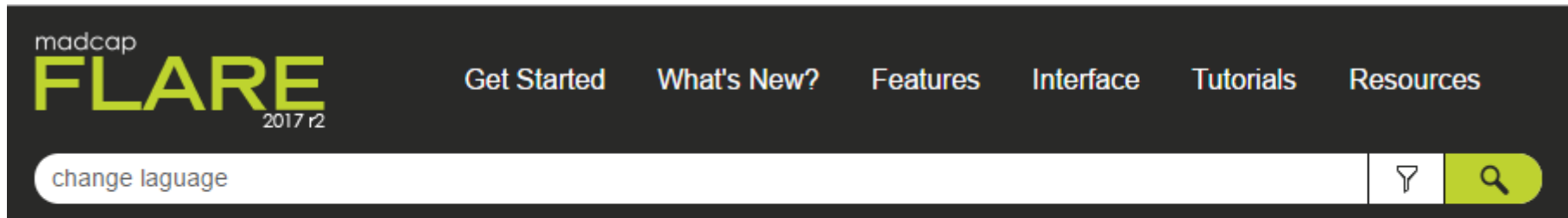
[Integrating Flare and Pulse](#)

Learn how to integrate a Pulse system with a Flare community. This adds the Pulse social layer and community features to your published Flare output.

Gave up after briefly exploring the Top Nav menus (4)



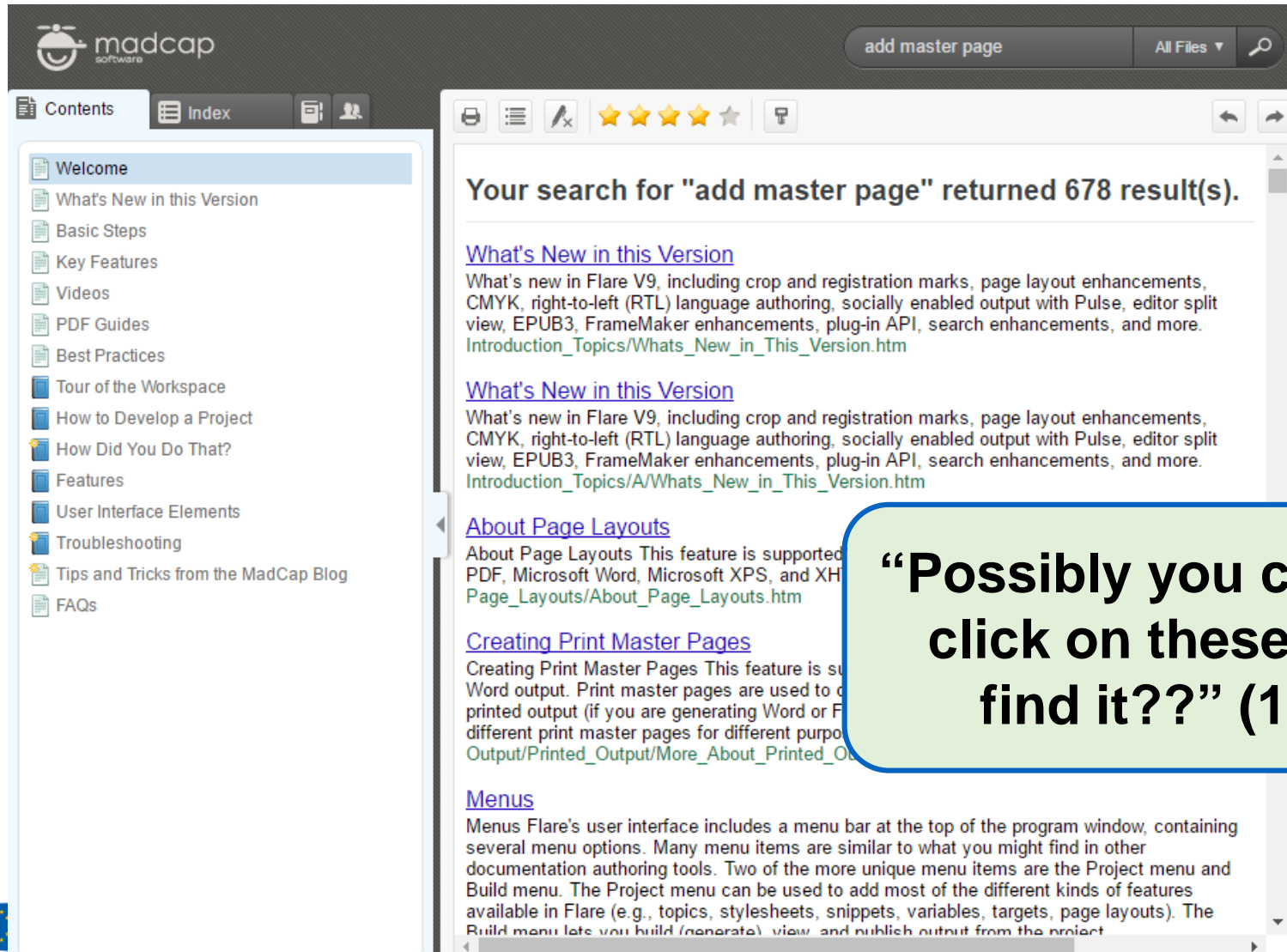
“How do you change the language of a project, say to French”



Your search for "change laguage" returned 0 result(s).

“I couldn't search as easily on the second version (1)”

“How do you add a Master Page to your project”

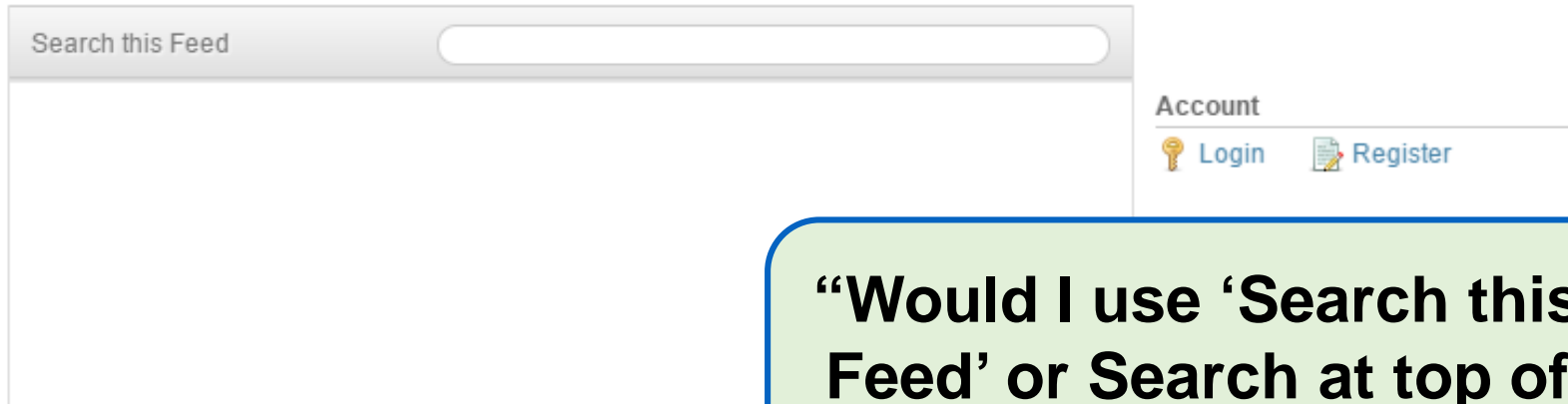


“Possibly you could click on these to find it??” (1)

“What is a Target”

added a topic to this project earlier (FamousSailors.com, see [Creating Topics](#)), we need to add that topic to these TOCs before we can build our outputs.

- ▶ ADD A TOPIC TO THE ONLINE TOC
- ▶ ADD A TOPIC TO THE PRINT TOC
- ▶ ASSIGN A TOC TO A TARGET
- ▶ MORE INFORMATION
- ▶ WHAT'S NEXT?



“Would I use ‘Search this Feed’ or Search at top of page?” (2)

Lessons learned

- Search is important
- BUT...
Search within Help is often inflexible
 - it frequently fails
 - users are not skilled at crafting effective search queries
 - they expect Search to give instant results with a minimum of effort
 - they lose faith and give up quickly with search
- We should anticipate frequent search queries and ensure they give useful results

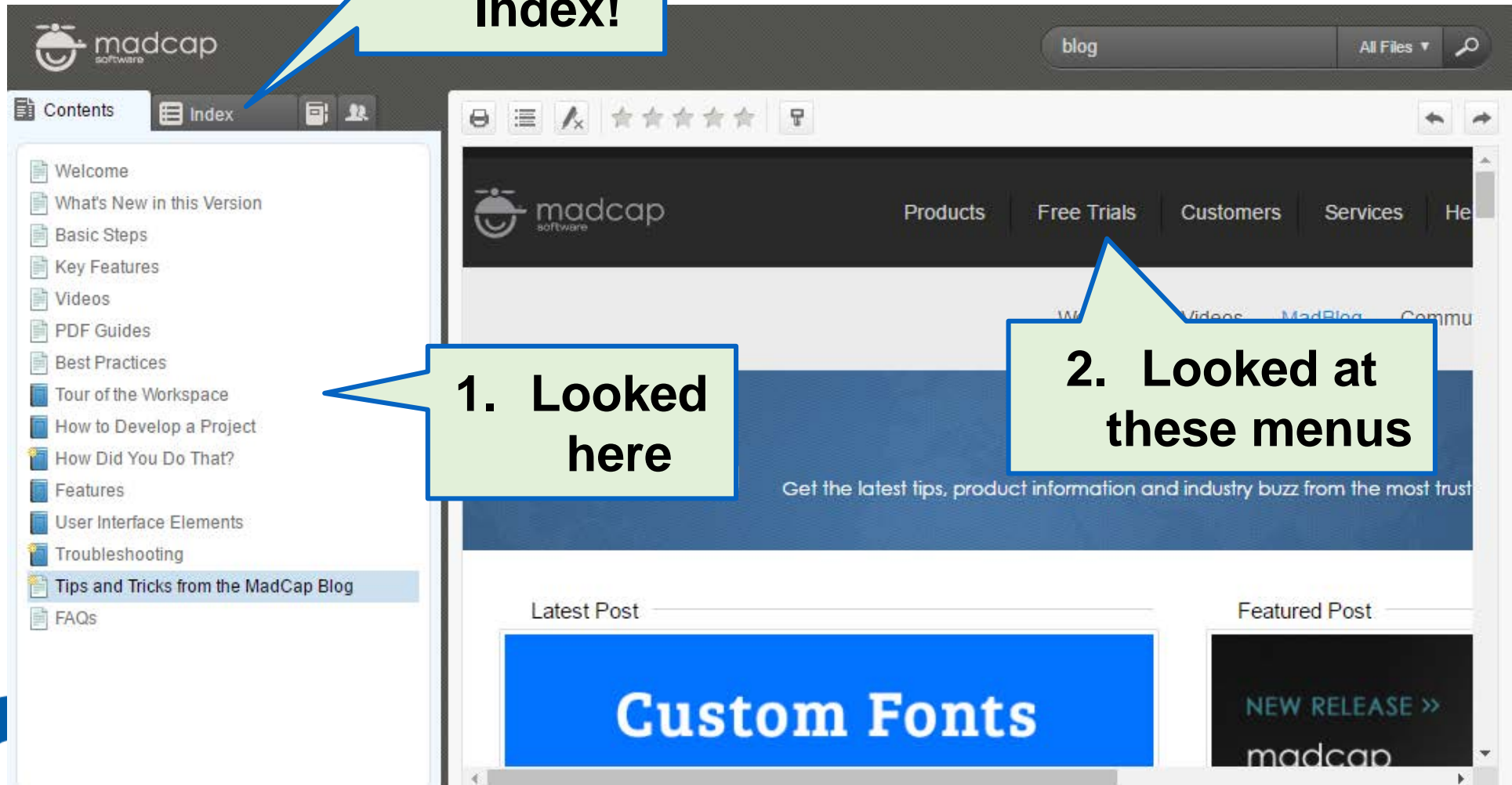
“It was easier to search for stuff because there was so much stuff” (4)

Key finding

The Index Epiphany

“How do you view broken links”

3. Clicked Index!



1. Looked here

2. Looked at these menus

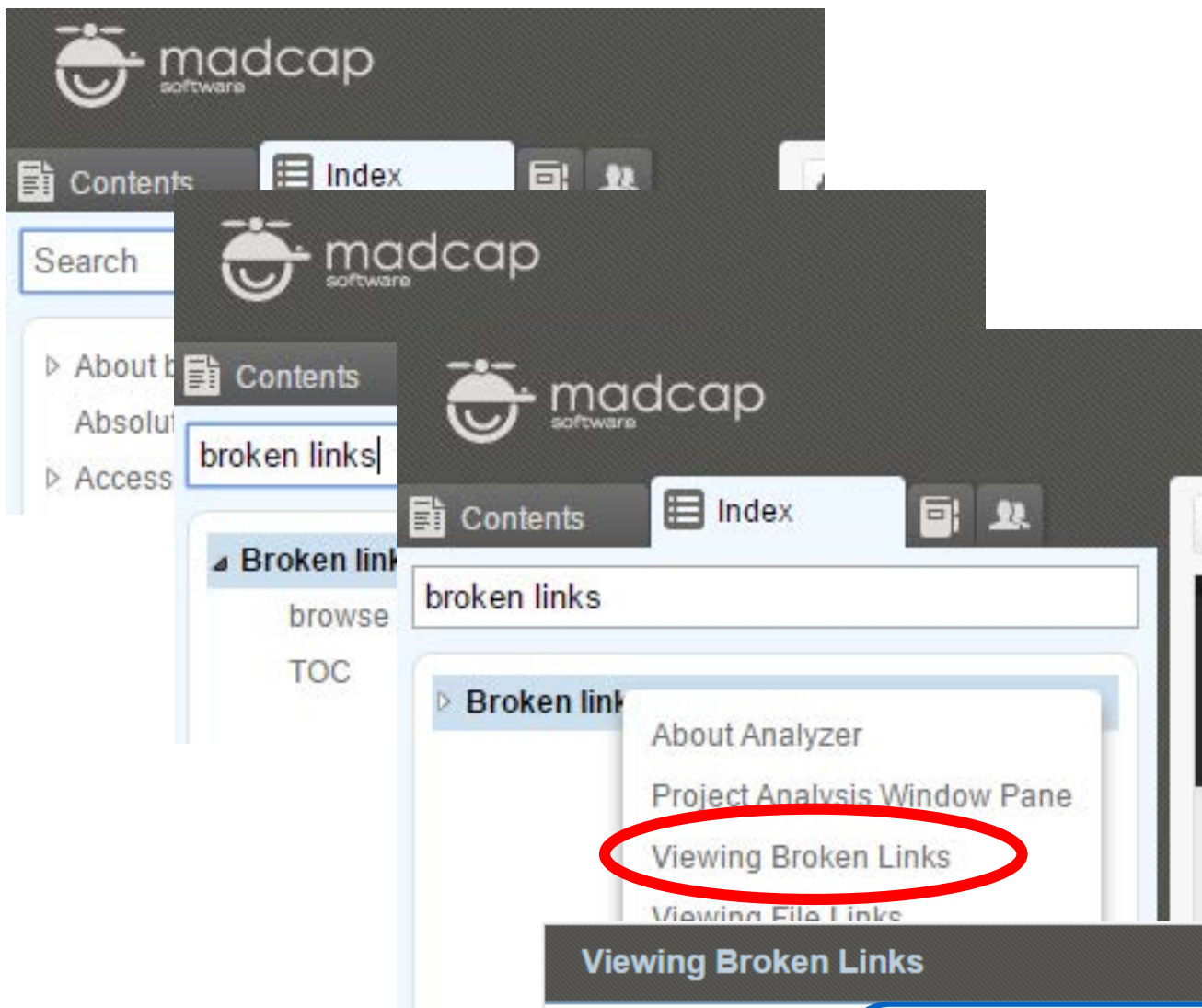
Custom Fonts

Featured Post

NEW RELEASE >>

madcap

rope?



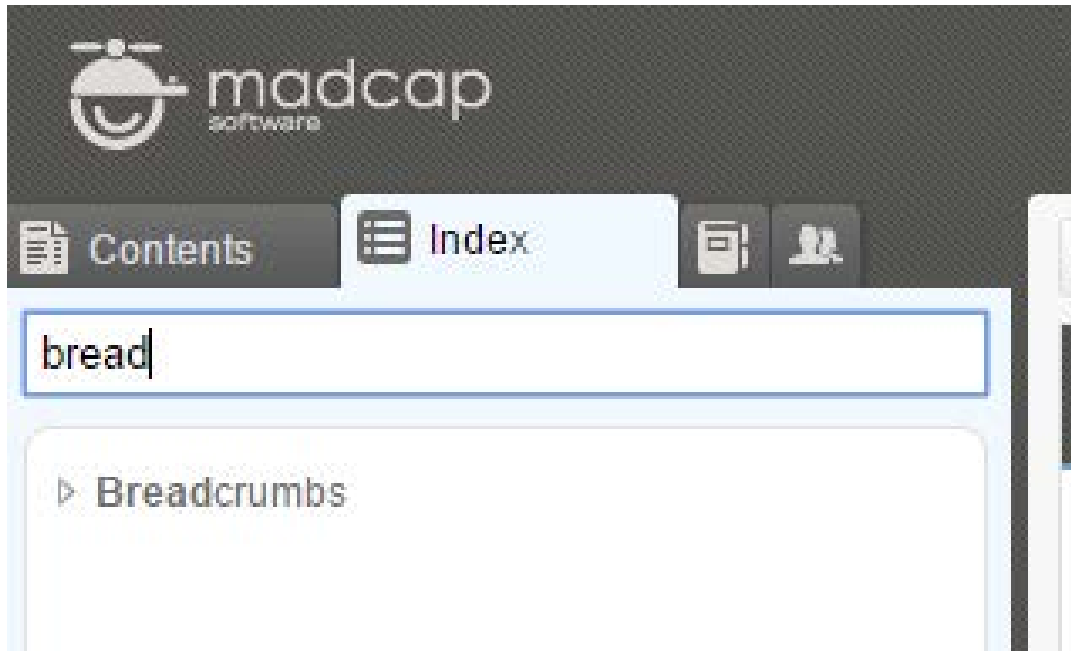
Viewing Broken Links

You can view a list of file... it is trying to find,
the link text, the link tag,
broken link is highlighted

- + HOW TO VIEW AND FIX
- + NOTES
- See Also

“That was good!” (4)



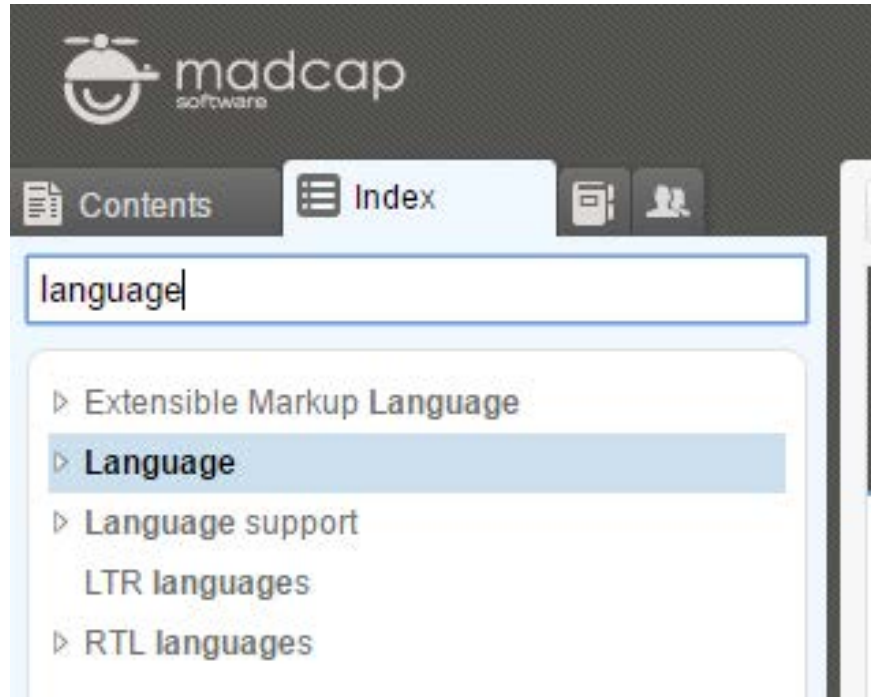


**“Can I just try
bread crumbs?”
(4)**

“Wow!” (4)

**“Oh, I just spelt
breadcrumbs
wrong before.” (4)**

“How do you change the language of a project?”



“The index was better because it came up with suggestions” (4)

“Why did you type just one or two words into the index, whereas you typed entire questions into the Search?”

**“I thought the Index was just one word – or keywords. Search appears to be more asking a question.”
(4)**

Lesson learned

- Perhaps indexing is not dead yet!

Key finding

Tunnel vision

target



Your search for "target" returned 969 result(s).

Target

One instance of an output type. It is the engine that takes all of your files and settings, and brings them together to produce the end result. When you build your final output, you are essentially building one or more of the targets in your project.

[Building Output Using a Batch Target](#)

Use the following steps if you want to generate and/or publish one or multiple **targets** in a batch from the user interface, perhaps scheduled to run at a specific time. example example Let's say you have a project with 17 **targets** and you need to build and publish 12 of those **targets** at the beginning ...

[Output/Flare/Building-Output-Using-Batch-Target.htm](#)

[Changing the Output Type for a Target](#)

Each **target** in your project is based on one of the output types that is available in Flare (Adobe FrameMaker, Adobe PDF, Clean XHTML, DITA, DotNet Help, Eclipse Help, EPUB, Microsoft HTML Help, HTML5, Microsoft Word, Microsoft XPS, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus). If you want a ...

[Output/Flare/Changing-the-Output-Type-for-Target.htm](#)

“What is a Target?”

[Specifying the Output File and Folder in a Target](#)

By default, in your project, Flare sends the output files to the Output folder where your project is located. It also uses a default name for the main output file. You can specify a different location and main entry file name for a **target's** output ...

[Output/Flare/Specifying-Output-File-Folder-in-Target.htm](#)

“Can you tell me what a Target is now?”

After you create a target, you can associate it with a skin. After you build the **target**, the output will be displayed in the skin. For more information, see [How to Associate a Skin with a Target](#) Open ...

“No” (7)

[About Building and Publishing Output](#) After you have created a project, added and formatted content, and developed a skin, you can build the output. Of course, you can build the output at any point during the development process, but if you make additional changes to the content, you should build the output again. [Output/Flare/About-Building-Output.htm](#)

[Associating a Search Filter Set with a Target](#)

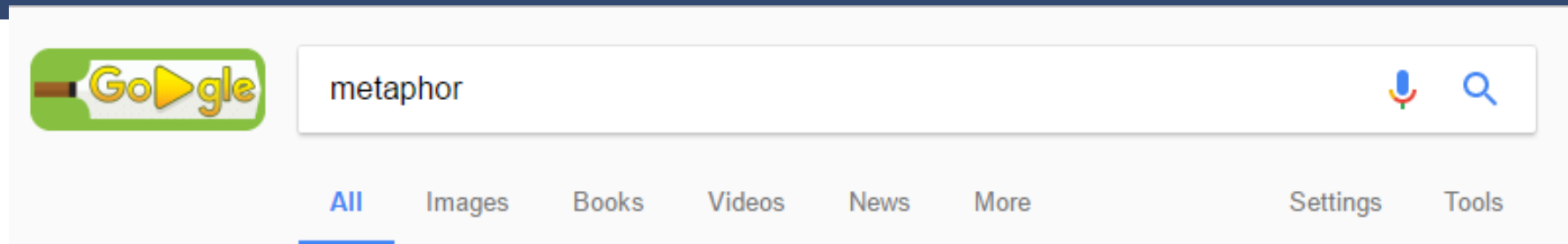
Instructions for how to associate a search filter set with a MadCap Flare **target** using the Advanced Tab of the Target Editor.

“Why didn’t you see the definition at the top of the search results?”

“I assumed it had just written what I had searched on.” (7)

“If they are going to emulate Google, then they need to copy it exactly.” (7)

Google definition in 2017



About 47,800,000 results (0.44 seconds)

metaphor

/ˈmetəfə, ˈmetəfɔː/

noun

a figure of speech in which a word or phrase is applied to an object or action to which it is not literally applicable.

"when we speak of gene maps and gene mapping, we use a cartographic metaphor"

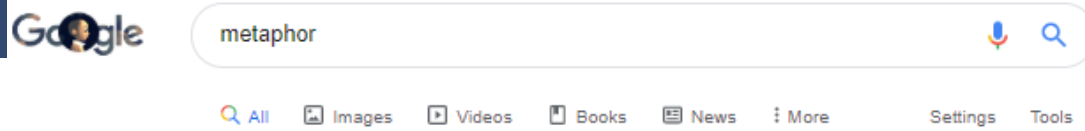
synonyms: [figure of speech](#), [figurative expression](#), [image](#), [trope](#), [allegory](#), [parable](#), [analogy](#), [comparison](#), [symbol](#), [emblem](#), [word painting](#), [word picture](#); *literary conceit*

- a thing regarded as representative or symbolic of something else.
"the amounts of money being lost by the company were enough to make it a metaphor for an industry that was teetering"

[Translations, word origin, and more definitions](#)

[Feedback](#)

Google definition today



Dictionary

Search for a word

metaphor
/ˈmɛtəfə, ˈmɛtəfoːr/

noun

a figure of speech in which a word or phrase is applied to an object or action to which it is not literally applicable.
"when we speak of gene maps and gene mapping, we use a cartographic metaphor"

Similar: figure of speech figurative expression image trope allegory

- a thing regarded as representative or symbolic of something else.
"the amounts of money being lost by the company were enough to make it a metaphor for an industry that was teetering"

Translations, word origin and more definitions

From Oxford

Feedback

People also ask

What is an example of a metaphor?



What are the 5 examples of metaphor?



What is a metaphor and simile and an example?



What is a metaphor short definition?



Feedback



Metaphor



A metaphor is a figure of speech that, for rhetorical effect, directly refers to one thing by mentioning another. It may provide clarity or identify hidden similarities between two ideas. Metaphors are often compared with other types of figurative language, such as antithesis, hyperbole, metonymy and simile. [Wikipedia](#)

Feedback

Another example of tunnel vision

2017 UA Europe Delegate Questionnaire
To be completed by all delegates at UA Europe 2017 in Harrogate.

1 Personal Details **2** Special Requirements **3** Interest Areas **4** Delegate List and Arrival Time

Personal Details

Full name for conference ID badge

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	First	Last	Suffix

Company or Organisation

Please enter your name **as you'd like it to show on your ID badge**, for example:
Dave Jones
Dr Sue Baker
Julia Lindberg Andersen

Lessons learned

- Don't rely on users seeing information outside the small area of the screen on which they are focussing
- If you need users to see something, make it really obvious!
- Use accepted standards and conventions where possible

Top three tips for effective user assistance

- Learn about your users and what they need to do
- Work on Search
- Embed as much as you can into the UI

Mobile First

- Term coined by Luke Wroblewski
- Design web content for viewing on mobile devices, and adapt for desktop screens
- Why?
 - More mobile users than desktop
 - Forces you to focus on essentials



Features of Mobile First

- Concise, simple, informal text
- Single pane
- Focus on search

Any More Questions?

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