Chapter 5
Avoiding Common Problems

To develop truly helpful online help, writers need to think like potential users, include information to answer their questions at an appropriate level of detail, and make the information easy to find. This chapter describes the 10 most common complaints that users have with online help, the underlying problems that lead to these complaints, and ways to identify the problems and avoid or fix them.

Planners and writers should use this chapter and Chapters 6 through 10 to remind themselves of the types of problems often seen in help systems and how those problems can be minimized or eliminated.

The 10 most common complaints that users have with online help are:

1. I can't find what I'm looking for.
2. I can't figure out what's going on.
3. I can't figure out what will happen when I do something.
4. There's too much detail.
5. There's not enough detail.
6. I can't get to the help when I want it.
7. The program isn't working the way the help says it should.
8. Help says what the system does, but not how to use it.
9. I want a bigger picture of what this program can do.
10. The help is inconsistent and badly written and formatted.

If the creators of a help project have had time to go through planning steps 1 through 6 as described in Chapter 1, "Planning an Online Help Project," they should not encounter many of these problems when they review and test the help. Unfortunately, too many help creators don't go through all the steps, don't have enough time to do them thoroughly, or receive many last-minute changes. If you're reviewing one of those help systems, you can expect to find problems and may not have enough time to review and test thoroughly. Even if you do have time for a thorough review, the writers and programmers probably won't have time to fix all the problems.

Set up a spreadsheet listing each problem you discover, and the suggested fix. Divide the problems into three categories, as described under "Categorizing problem severity" later in this chapter. Make sure that category 1 problems (serious errors) are fixed before the help ships. Fix as many category 2 problems as possible; you might want to subdivide this group by severity.

1. I can't find what I'm looking for.

This complaint covers a range of problems, so you need to determine what's causing the problem before you can identify an appropriate cure.

Causes

Information not in the help

When you planned the online help, you may have decided not to include some information (for example, because it is in a printed document; or you chose to include only dialog and overview help, but not help for fields and controls). In other cases, the writer may have left out the information by accident.

Help not context-sensitive

Online help systems should have a relevant ("context-sensitive") help topic linked to each application dialog, window, or page.

However, if the help always opens at the table of contents, instead of a relevant topic, users are forced to guess what topic to look up, or they must turn to the index or search function.

Some help systems open to a "what do you want help with" dialog that provides sample choices and a text-entry box, but users may find the choices irrelevant and thus must guess what keywords or question to type in.

Poor table of contents

Topic titles and the structure of the table of contents need to be logical from the users' point of view, which may be quite different from the developers' point of view. A help contents page should be similar to the structure of a table of contents in a printed book.

Poor indexing

All the usual book-indexing questions apply to online help. In addition, help indexes may have a lot of "noise" in them, if writers have allowed their help-authoring tool to construct a draft index, and then have not edited the result. In addition, information may be in the help but not be indexed, so users can't find it.

Poor linking between topics

Any one help topic may answer part of a user's question, but may not be sufficient. Other help topics might answer related questions, but they might not be linked in a convenient or obvious way. Often no links are provided to more general descriptions of tasks or dialogs, even when this information is in the help.

Diagnosing the problem

You already know whether the help opens at dialog-level help or at the contents page. Take some sample questions from your task and question list and try to find the answers, using the index, the contents, and help called from some of the relevant dialogs. Start at any point in the help and try to find related information. For example, using a procedural topic, try to find

the associated conceptual help. See if all the necessary information is present—at least something relevant to each question.

Cures

- Identify missing information and decide whether to include it.
- Edit the index and table of contents; see Chapter 6, "Producing the Contents Page and Index."
- Improve linking between help topics; see Chapter 7, "Providing Navigation and Context."
- Include topics for a range of users from novices to experts; see Chapter 8, "Meeting the Needs of Novices to Experts."
- Change linking between dialogs and help; see Chapter 9, "Linking from Application to Help."

2. I can't figure out what's going on.

Common questions, particularly from novice users, often are not answered by help systems:

- How did I get here (to this window, dialog, or page)?
- Where do I go—or what do I do—next? (I'll feel reassured if I know the next step is taking me toward my goal or at least isn't leading me further astray.)
- What does this control do, and should I be using it now? What is its purpose?
- What happens if I choose this option instead of that one?
- Will I be able to recover if my choice is not what I really wanted to do?

Causes

Help topic says only what to do

If context-sensitive help is the default, each topic often tells users only what they can do on a particular dialog, but doesn't say where they came from, where they will go next, or how to decide which choice to make. This can be a particular problem if they're doing something complicated involving a series of steps, and they're not sure if they made a correct choice earlier in the steps.

Writers assume users understand the bigger task

Writers often assume that users already understand how to perform a higher-level task and only need to be told how to operate a particular control, but controls often interact in unfamiliar ways. For example, sometimes you must do A first, then B, but the help doesn't say that. Users often need a bigger picture before they can use a specific control effectively.

Users access help topic from contents or index

Some users will access a topic from the index or contents, often while hunting for a way to do a task. The help may tell them how to do what they want, but not how to get to the part of the application that is described in the help topic. An old assumption was that help should just describe how to use the dialog you are in, because that's all you would want or need to know at that point; you didn't need to be told how to get there, because you already were there. That is not always the case.

Diagnosing the problem

Select topics at random. Ask the following questions:

- Do these topics make sense without prior knowledge of the product or process?
- Do the topics link to other topics, to give a bigger picture? For example, do they link in three directions: to less granular help (more general), to more granular help (where relevant, for example, to fields and controls), and to other related pieces of help?
- Do the topics meet the guidelines for that topic type? (If so, but they are still not adequate, you need to reconsider or redefine the guidelines.)

Cures

- Add a few words to some topics, to clarify the context.
- Improve linking between help topics; see Chapter 7, "Providing Navigation and Context."
- Include topics for a range of users from novices to experts; see Chapter 8, "Meeting the Needs of Novices to Experts."
- Include an overview topic for tasks that require use of different dialogs.

3. I can't figure out what will happen when I do something.

Novice users are often afraid to do something because they don't know what will happen and whether they can recover (roll back) if they make a mistake.

Causes

User interface is unclear

A well-designed user interface should provide enough information for users to determine the consequences of most actions, but if it doesn't, the help must try to compensate for the lack.

In other situations, the interactions between controls may be too complex to describe within the interface. (See problem 2: "I can't figure out what's going on.")

Not enough information is given in the help

The help says what to do but gives no indication of why or what the consequences are.

Writers did not have the information or the time to work it out for themselves

This is a project management problem.

Help specifications were not adequate

That is, the specifications did not call for the type of help that is needed. This is a planning problem, often associated with inadequate consultation between software developers and help developers.

Diagnosing the problem

Use sample tasks and questions you developed at an earlier stage in the project.

- Read random help topics to see if enough information is in them, or if they clearly link to topics that give the necessary information.
- If a working application (or prototype) is available, have someone who has never seen the product attempt to perform the tasks, while referring to the pieces of help that are immediately linked to those dialogs.

Cures

- Tell users what should happen next and what to do if that doesn't happen (provide a link to a problem-solving or other topic; don't dump problem-solving information into a procedural topic).
- Tell users the consequences of different choices (for example, include a table or list of choices and what they do).
- If a choice can't be reversed, be sure to say so up front.
- Improve your guidelines for writing help, if many of the help topics do not address this problem.

See Chapter 7, "Providing Navigation and Context," and Chapter 8, "Meeting the Needs of Novices to Experts," for more information.

4. There's too much detail.

Many users, particularly novices, get lost in too much detail that they don't want, need, or understand. Other users do want and need details, so the writer's job is to make sure the information is there, but doesn't get in the way.

Causes

Writers assume all users need this level of detail

Writers often write for advanced users, who may want or need the detail, or writers believe that all users need to understand the often complex concepts behind an action before they take the action.

Writers don't know how to subdivide information

Inexperienced writers in particular may try to put all relevant information into one topic rather than dividing it into linked topics.

Help tries to cover every alternative

Most software provides several ways to accomplish the same action (from the keyboard or using the mouse, selecting from menus or using toolbar buttons), but help does not need to describe every possibility in each procedure.

One help topic must cover several dialogs

Several dialogs may be derived from the same routine in the program and are linked to one help topic, but they may be sufficiently different that the help topic must be either generalized and vague or long and complex, neither of which meets the users' needs. This is a programming problem as much as a writing problem, and the writer may be unaware of the programming situation.

Diagnosing the problem

Look for:

- Long scrolling topics
- Paragraphs of explanation intermixed with procedures
- Lots of "if–then" branching within a topic
- Several overlapping ideas in one topic, instead of in related topics
- Problem-solving information mixed into procedural topics

Cures

- Split complex topics into several related topics; add relevant links. This cure is especially useful for many examples of "if–then" branching.
- Cut out unnecessary detail, digressions, and explanations, or split into related topics. Think of the way magazine articles put related information into sidebars or boxes, so it doesn't interrupt the flow of the main article.
- Use pop-ups for brief explanations, instead of breaking the flow of the main topic; think of the use of footnotes for this purpose.

- Put the procedure in one topic, background information in another, problem-solving in a third, and so on; add relevant links between all the topics.

See Chapter 8, "Meeting the Needs of Novices to Experts," for more information.

5. There's not enough detail.

When the help includes only the obvious, users complain that the help is too simplified and they need more information or more advanced information.

Not every item needs a long explanation (or, sometimes, any explanation), but if users ask for help, they probably want some guidance, not just a repetition of what's in the field label on the user interface.

Causes

Writers lack information, or are too familiar with the product

With a new product, writers often don't have the necessary details. With revisions, writers are often so familiar with the product that they don't think to include some information; or they don't think any explanation is necessary, perhaps because they assume the user would already know the information.

One window or dialog contains several tabbed pages

If the help for a dialog is the same for all of the tabbed pages, it may be too general and vague or too long and complex.

One help topic covers several dialogs

Several dialogs may be derived from the same routine in the program and are linked to one help topic, but they may be sufficiently different that the help topic must be either generalized and vague or long and complex. The writer may be unaware of the programming situation.

Diagnosing the problem

Have a list of things advanced users might want to know. Can you find the answers? Look for:

- Field help that says no more than the field label says. Ask questions like: "Does it matter in what format this date is entered? If so, what is the correct format? If not, say so!" or "Is this field case-sensitive, and how many characters am I allowed?"
- Remember that many people use words in different ways. Regional and international conventions can vary quite a bit, so include explanations of words that might be used in more than one way. For example, "title" can mean "Mr., Ms., Mrs., or Dr." or it can mean a job title like Manager, which others might call "position."
- Procedures that give no context, explanation, or links to more information.
- No links to introductory, conceptual, or other topics.
- Similar dialogs that arise in different situations (a map or list of the application dialogs is a great help here). Does each dialog have its own explanatory topic, or does one topic cover several dialogs? If the latter, does the help topic make sense in each situation?

Cures

- Include the information if it's not there.
- Add relevant details, but appropriately. If a few words are all that's needed, add them to the topic. If a longer explanation is required, link to a related topic. Write new topics if necessary.
- Link to advanced topics from basic or overview topics; don't clutter basic information with details, but be sure people can find the details if they want them.

See Chapter 8, "Meeting the Needs of Novices to Experts," for more information.

6. I can't get to the help when I want it.

Many users, particularly novices, aren't sure how to get help, or are unaware of the several ways and what the differences are. Even when they do know how to get help, the program may not provide it when they want it.

Causes

Help button or F1 gives an error message or nothing at all happens

This is a worst-case scenario that should be caught by testers; it is usually a programming problem.

No Help button or menu-bar item

Some users may be unaware of alternative ways to get help, or the alternative ways don't work on some dialogs, or a dialog has no help provided, or seemingly trivial dialogs don't have help buttons.

A wizard or other startup window prevents access to the main program

Some programs' default startup sequence includes a wizard to assist users in choosing files or features. However, the wizard may not include enough information to help users understand the choices they need to make. In some cases, users can close the wizard and go directly to the program and the help, but the wizard may not have a clear indication of how to do this. In other cases, closing the wizard closes the program; this situation most commonly occurs when the wizard is intended to lead new users through essential setup information.

Diagnosing the problem

Testing should reveal whether F1 or a Help button does not work, but testers may not be required to determine (a) if each dialog should have help, and (b) if the correct help opens when requested from dialogs that provide it.

Usability tests should indicate where help is needed but is not provided.

Make sure that someone tests the product when it has been connected to the help, to verify that the correct help topic does open.

Cures

Solving these problems may require programming changes.

- Make sure that a relevant dialog-level help topic—not field-level help—is linked to each dialog through F1 as well as through a Help button or menu-bar item.
- Make sure all pages of a wizard have a Help button (if the descriptions on the wizard are not sufficiently self-explanatory, from a naive user's point of view) and an obvious way to cancel the wizard and get to the program's main help files.

See Chapter 9, "Linking from Application to Help," for more information.

7. The program isn't working the way the help says it should.

One of the most frustrating things for users is to look in the help, find what they think is the answer to a question, and then discover that it didn't work. They wonder if they did something wrong, or what else they can do to solve their problem, but often they can't find the answer.

Causes

Late changes to user interface

If the programmers don't tell the writers about changes, the help may not match the program. This is a project management problem.

Inadequate reviews or testing, and writers' lack of knowledge

Often writers do not know about some quirk of the program, usually because they haven't had the time or opportunity to use a complete working system. A common cause is the interaction between controls; if an option is set in one part of the program, it may affect seemingly unrelated choices in other parts of the program. Reviewing and testing should reveal these problems, but reviewers may be too familiar with the system to notice some quirks, and testers often don't examine the contents of help topics.

Diagnosing the problem

Check all procedures against the real program, not the specifications.

- Are any steps left out?
- Do any procedures include things the user might not understand or do correctly—for example, setting specific options in other parts of the program?
- Do any procedures depend on pre-existing conditions or procedures having been done correctly? Is it clear to the user what these are?
- Does the name of every dialog, field, and control match the actual user interface?
- Does the help mention the circumstances under which a control or field is not available, and how to make it available (if that is possible)?

Cures

- Test and edit procedural information and make necessary changes.
- Link from standard procedures to topics on "what to do if XYZ doesn't work."
- Include a problem-solving guide with real diagnostic and cure information in it, not just statements like "see your system administrator."

8. Help says what the system does, but not how to use it.

This complaint is commonly heard about systems developed for in-house use, which are often tightly connected to a defined workflow or the process and procedures within an organization.

A similar complaint relates to more generic software, where a user doesn't know what sequence of steps is necessary to, for example, produce a newsletter or create a graphic.

Causes

Inappropriate user expectations

Users are often unfamiliar with what they are attempting to accomplish, so they can't relate your product to actual work tasks.

Help focuses on low-level tasks

Low-level tasks are usually easy to understand, but don't give clues on workflow or decision making.

Help focuses on what various controls do

Help might not include information on when users might want to use the controls, what relationship the controls have to user tasks, and the conditions under which the controls are not available.

Diagnosing the problem

Use task lists. Attempt to complete a task using the application.

- Can you tell where to start?
- If you need to stop halfway through a task (to go look up some missing information, for example), can you save your work and pick up where you left off later? If not, what are your choices?
- Do low-level task descriptions link to higher-level workflow and "big task" topics?

Cures

Help-system planners must decide how much generic information to include. They may decide that it's not the help system's job to teach people about their field (accounting, graphic design, or whatever), but rather to teach them how to use the program to do their work. Some

users, however, won't be familiar with the field; for example, their management may have instructed them to use the product and left them to fend for themselves. Consider these ways to help these users:

- Include some glossary terms or general topics explaining the terminology of your product and its uses and limitations.
- Include some conceptual topics on common tasks users might need to perform. Link the conceptual topics to procedural topics, and make sure the context is clear in all cases.
- Refer users to other sources of information, or link to other information such as the organization's policy and procedures documents (for in-house programs).
- Consider some form of performance support in a future version of the product.

See Chapter 8, "Meeting the Needs of Novices to Experts," for more information.

9. I want a bigger picture of what this program can do.

Many users may be familiar with a similar product, and wonder whether yours can do things they're used to doing. Others may wonder if they're missing out on something, but they don't know what questions to ask. In some cases they know the questions but can't find an answer.

Causes

Some information is only in printed or PDF form

The online help often includes only procedural and system information and not any conceptual or overview information. Although the bigger picture is in the printed (or PDF) documentation, the user may not know that or may not have a copy of the printed or PDF document.

Information is in the help but can't be found easily

The information is there, but it's buried and not revealed by the index or the table of contents.

Information is not available to users in any form

Some products are so lacking in documentation that the only source of information is other users—for example, through online user groups. Open-source and shareware software is particularly subject to this problem; information may be available for programmers, but ordinary users may not understand it or even know it exists.

Diagnosing the problem

Have a list of things that knowledgeable people would know but beginners might not. Are those topics covered somewhere in the help? Can people find them?

Cures

Some possibilities to consider:

- Include "tip of the day" topics (may need programming support).
- Use wizards and coaches (needs programming support).
- Include introductory or tutorial topics.
- Provide overviews, with several levels of detail and links to specific procedures.
- If a printed or PDF book is provided, you could put "look what you can do" information in the book, cross-referenced to and from the help.
- If a printed or PDF book is provided, you could put information in both the book and the help, to assist people who don't have the book available.
- Link between the help and the online manual.

See Chapter 8, "Meeting the Needs of Novices to Experts," for more information.

10. The help is inconsistent and badly written and formatted.

This complaint covers a wide range of writing and formatting problems that should be examined during copyediting. For example:

- Misused or inconsistently used bulleted or numbered lists
- Long, wordy sentences or paragraphs that should be turned into lists
- Poor organization of material within topics and between topics
- Unclear or misleading topic titles
- Jargon, unfamiliar words, and inconsistent use of terms
- Inconsistent style and presentation of procedures
- Lack of consistency in capitalization and punctuation
- Lack of consistency in help window size and placement on screen
- Excessive or inconsistent indentation
- Tables and illustrations that require sideways scrolling to see

Causes

Inexperienced writers

In addition to the many possible writing problems mentioned earlier in this chapter, inexperienced writers may not follow the principles of good technical writing, including task orientation, information chunking, use of active voice, and so on. Appendix C, "For More Information," includes several good books on this topic.

Converting from another format

Many formatting problems arise when converting files from Microsoft Word or other programs into help files, particularly when styles have been used inconsistently or incorrectly.

Single-sourcing

Help material single-sourced from printed materials often needs modification to fit a screen format, but this often isn't done (usually because of lack of time).

Inadequate testing

Help is not checked online, so problems that don't show up in print aren't noticed.

Inadequate specifications and project style guide

Writers followed the specifications and style guide, but those documents weren't detailed enough. This is a particular problem on a project with several writers, or unskilled or inexperienced writers.

Browser problems

With browser-based help, some features may not work in all browsers, and different screen sizes and resolutions may change the appearance of the help in ways that cause problems.

Diagnosing the problem

- View the help online. Look for formatting problems, especially in tables and lists.
- Thoroughly copyedit the file, looking at format and presentation as well as content.
- If the help is browser-based, check it at different resolutions, screen sizes, and font sizes.

Cures

- As needed, rewrite, change paragraph styles, and make other formatting changes.
- Consider some tables and figures. Are they needed? If so, can they be changed to better fit an online format?
- Revise the specifications.

See Chapter 10, "Copyediting and Production Editing," for details.

Table 1. *To diagnose and cure common help problems, do these things before shipping the help. Better still, plan and write the help so these problems do not occur.*

Do this…	Ask these questions...	To diagnose this problem	Cure for the problem	More info here
Using sample questions, test index	Can I find the answer to the questions using the index?	Poor indexing	Edit index; add, delete, or reword entries	Chapter 6
Using sample questions, test table of contents (ToC)	Can I find the answer to the questions using the ToC?	Poor ToC organization	Edit ToC; reorganize order of topics	Chapter 6
		Poor topic titles	Reword topic titles	Chapter 10
If you can't find the information using index or ToC, search the help	Is the information in the help file?	Missing information, poor index	Write new topics or improve index	Chapter 6
Select random topics in help	Do topics have links to related topics, for a bigger picture?	Poor internal linking	Add or reword links	Chapter 10
	Do topics make sense out of context?	Unclear or incomplete topics	Add brief explanations	
	Does help open at dialog-level or procedural topics?	Help always opens at ToC or index	Programming change	
	Are topics long, requiring lots of scrolling? Are paragraphs of explanation mixed with procedures? Do topics contain several overlapping ideas, or if–then branching?	Too much detail	Split into several linked topics Use pop-ups for brief explanationsCut out unnecessary information	Chapter 8
	Do topics (particularly for fields and controls) say only the obvious?	Not enough detail	Add information or relevant links to existing information	Chapter 8

***Table 1**, continued*

Do this…	Ask these questions...	To diagnose this problem	Cure for the problem	More info here
Attempt to complete sample tasks	Can I find necessary information in the help topic associated with the dialogs used in the task? Is help available for controls as well as dialogs? Do procedural topics provide context, or include links to more information?	Missing information, poor linking	Add information or relevant links to existing information	
Check for similar dialogs that share one help topic	Does the help information make sense for each dialog? Is the help topic too long and complex, or too general?	Too much or not enough detail	Programming change Revise help to cover all situations Break into several topics, if necessary	Chapter 8
Check help against specifications and style guide	Do the various topic types follow the specifications?	Inconsistency or poor writing	Revise content of topics	
	Does help follow specifications, but still have problems?	Inadequate specifications or style guide	Revise specifications	Appendix A
	Is the help topic trying to cover several variations of a dialog?	Programming problem (for example, two dialogs calling same help topic)	Negotiate change in program or links to help	
Check help against developed product	Does product work the way the help says it does?	Incomplete or incorrect information in help	Rewrite help topic or link to other information	Chapter 8
	Are any dialogs without help?	Missing information	Write new topic	
	Are any fields or controls not mentioned anywhere in help?	Missing information	Add information to existing topic, or write new topic	
Check compiled help on different monitors or resolutions	Does help display correctly? Check tables and illustrations, and numbered and bulleted lists.	Display problems	Rewrite or reformat	Chapter 10
Bring in novice users to test the help	Can they find answers to their questions using the help?	Most problems	Look in relevant chapter of this book for suggestions	

Categorizing problem severity

When you don't have time to fix all the problems, use the principles of triage to categorize the severity of problems. Make sure that category 1 problems are fixed before the help ships (or alert the product manager of possible serious consequences). Fix as many category 2 problems as you can in the time available. You might want to subdivide this group by severity (fix the worst) or by time required to fix them (fix lots of easy ones). If necessary, leave category 3 problems until the next release.

- Category 1: Errors that must be fixed because the content is factually incorrect or the wording is unclear or ambiguous and may lead to serious misunderstanding; or changes that are required for legal reasons.
- Category 2: Changes that improve the writing or presentation but are not essential to understanding.
- Category 3: Changes that others might consider pedantic nitpicking, and that the vast majority of the audience won't care about or probably even notice. (Many grammatical and usage errors are in this category.)

Conclusion

Use the hints provided in this chapter to plan and write online help so it avoids users' most common complaints. Prioritize problems and fix the most serious first.

Updates and corrections to this chapter can be found on Hentzenwerke's Web site, **www.hentzenwerke.com**. Click "Catalog" and navigate to the page for this book.