



## Divide and Conquer: Providing Web-based User Assistance at the Point of Use

By [Scott DeLoach](#)

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### Introduction

Web-based applications provide numerous display options for embedded user assistance (UA). Unfortunately, most applications continue to provide a unified, external help system to answer all user questions. An external help system is an excellent approach to providing in-depth conceptual information and procedures. The weakness of an external help system is that it's a passive, external resource. The user has to realize they need assistance, open the help, locate the relevant information, and return their focus to the application. For many questions, this process feels like too much effort for the perceived benefit. As a result, users do not use the help system.

Most user questions should be answered at the point of use (or rather, the point of confusion) using embedded assistance. To the user, embedded assistance provides a large benefit with practically no effort. After using embedded assistance, users are much more likely to click on help links and spend more time using the external help system.

In this article, I will explain how we can use field labels, popup windows, UA panels, and dedicated UA areas to assist users. My goal is to help you select the best embedded assistance display option for different types of UA information.

### Basic Questions: Field Labels and Tips

One of the most common question that users have is "What do I type into this field?". Unfortunately, poorly written field descriptions are a major reason that users think that help systems are not useful. It only takes a few field descriptions like "**First Name** - Enter your first name" to convince users that opening the help is a waste of time.

In most cases, the user only has a basic question such as, "What is the maximum number of characters I can type into this field?". These questions should be answered as part of the field label. In the screenshot below from Hotmail ([www.hotmail.com](http://www.hotmail.com)), the password field label informs the user that their password must be at least six characters without spaces.

#### Account Information

E-mail Address  @hotmail.com

Password  
Six-character minimum;  
no spaces


This information should also be provided in a procedural topic about creating a Hotmail account, but the user should not have to open the external help system to answer a quick question.

### Exceptions, Photos, and Related Fields: Popup Windows

Obviously, not all field-level questions can be answered with field labels. These questions are often based on exceptions like "What if I don't have a middle name?". Other questions, such as "How do these fields relate to each other?", or "What is the difference between these two items?", are best answered using a table, list, or photograph.

The Dodge website ([www.dodge.com](http://www.dodge.com)) uses embedded DHTML windows to provide help for related fields. These grouped help topics allow the user to answer multiple questions at the same time, and they make it much easier to see how different fields are related to each other.

**2004 RAM 1500 REGULAR CAB  
LARAMIE 4X2 SWB**



Pricing Information ?

**Pricing Information Terms**

**Base Price:** Base model price

**Package:** Total cost of the package that you have selected

**Options:** Total cost of the options that you have configured thus far

**Color:** Costs of seat, paint, and trim upgrades

**Destination:** The cost of shipping vehicles from the manufacturing plant to the retailer

**MSRP:** Manufacturers Suggested Retail Price, plus destination costs

**Accessories:** Optional Mopar Accessories to customize the look and performance of your vehicle

The Dodge site also uses popup windows to provide photographs of truck parts and accessories. These popups allow the user to verify that they have selected the right item. In the screenshot below, the user has clicked on the "Next Generation 4.7L Magnum(R) Engine" link to open the popup window. This website is designed to help people purchase cars and trucks, and the photographs do an excellent job of educating the user while marketing the products.

**Powertrain**

**Engine**

[Next Generation 4.7L Magnum\(R\)](#)

[V8 Engine](#)

[Included](#)

**Transmission**

5-45RFE Five-Speed Automatic Transmission

\$1,170.00



GVWR, Towing, Suspension

Comfort, Convenience

Tires/Wheels

**Next Generation 4.7L Magnum(R) V8 Engine - Microsoft Internet Ex...**



**OPTION:**

**Next Generation 4.7L Magnum(R) V8 Engine**

Next Generation 4.7L Magnum(R) V8 engine. Magnum is a registered trademark of DaimlerChrysler.

### Advanced Questions: UA Panels ≡ CONTENTS

UA panels provide enough space to answer advanced questions, such as "Why do you need this information?". They normally appear and disappear when the user clicks on a link. However, some applications provide dedicated UA panels. In the example below, the Alamo website ([www.alamo.com](http://www.alamo.com)), includes a static UA panel to assist customers as they rent a car. The UA panel's topics focus on why the user should provide the requested information, how this information is used, and how to handle special cases. The UA panel is large enough to

answer numerous questions, and it can link to help topics in an external help window if needed.

Helpful Information

**Country of Residence:** This is required in order for us to provide you with appropriate products. Depending upon your country of residence the rate you are quoted may include certain coverage options, taxes, and other fees. These products are designed to meet the needs of customers traveling abroad to the US. The base rate you will see on the car availability page will reflect this. You can review the product inclusions on the summary page that comes after the car availability page.

To receive a rate inclusive of appropriate products, non-US citizens should leave the Rate Code field blank. If you prefer a car-only rate, you may use one of the promotional codes advertised on the site.

### Step 1: Tell us about your trip \* Required Fields

Country of Residence? \*

(Select) ▼

Pickup / Dropoff Location

Please enter one ONLY: city, state, country or a 3-letter airport code (for example, Fort Lauderdale or Florida or United States or FLL)

Pickup Location\* Find a Location

Pickup Date\*  
MAY-2003 ▼ 12 ▼

Pickup Time\*  
9:00 AM ▼

Dropoff Location\* Find a Location

Dropoff Date\*  
(Select) ▼ --- ▼

Dropoff Time\*  
9:00 AM ▼

Optional Rate Information

This section is not required for rate quote/reservation purposes. If you have a specific rate, promotional, association or coupon code, please enter it here.

Rate Code	Promo Code/Assoc. I.D.	Corporate I.D.	Coupon Code

Check here if you will be making a reservation using an applicant code.  
(Note: Users must book rate code BX with a Corporate I.D. in order to use an applicant code).

Since the UA panel is always on the screen, the Alamo website uses JavaScript to automatically describe the field that has focus. The user never has to ask for help, and relevant assistance is always available on the screen.

### Overviews: Page and Section Introductions ☰ CONTENTS

Page overviews can be used to introduce an application page and to reassure users that they are on the correct page. If a page is divided into multiple sections, each section might have its own overview.

The Bank of America website ([www.bankofamerica.com](http://www.bankofamerica.com)) uses page and section introductions to describe basic concepts and tasks. Each section also links to a popup help topic that provides section-specific procedures and more in-depth conceptual information. When needed, the Bank of America site also uses a dedicated UA panel to answer common user questions. Section-specific questions and short answers are provided within sections (see "Why aren't all of my payees listed here?" in the screenshot). By answering common user questions in the application, the Bank of America site increases user success.

**How do e-Bills make paying bills more convenient?**

Paying your bills online is even easier and faster when you receive e-Bills. An e-Bill is just like the paper statement you receive in the mail—the same information without the paper. With e-Bills, you can receive and pay your bill online in the same place.

**How do e-Bills work?**

Many of the companies on our payee list can send e-Bills. After you request e-Bills from one of your payees, the payee starts sending your bill online to Bill Pay. You control the payment amount and date of each e-Bill you pay.

New e-Bills appear in several places in Bill Pay, including the Incoming e-Bills box on the Bill Pay Overview page and on the e-Bills Overview page.

**Request e-Bills** ?

You can request e-Bills from the following payees that you've already added to your payee list.

[Bankcard Services](#)  
Edward Jones MC -8065

[Request e-Bills](#)

[Citibank Credit Card](#)  
citi bank personal card -4687

[Request e-Bills](#)

[Shell Energy Services](#)  
gas bill -445-9

[Request e-Bills](#)

**Why aren't all of my payees listed here?**

Only the payees you've added that can send e-Bills are listed. [Search or browse our list of payees that can send e-Bills](#)

**Payees That Send You e-Bills** ?

You already receive e-Bills from the following payees.

[Chrysler Financial](#)  
car loan -1284  
e-Bill automatic payment set up

[Edit e-Bill information](#)  
[Edit e-Bill automatic payment](#)

[Georgia Power](#)  
power bill -05 03  
e-Bill automatic payment set up

[Edit e-Bill information](#)  
[Edit e-Bill automatic payment](#)

The Neiman Marcus website ([www.neimanmarcus.com](http://www.neimanmarcus.com)) provides a rarely-seen but very effective approach to page overviews. The search page, as seen below, provides a description of the search tool with callouts and descriptions directly below the search area. This information is presented as a large graphic, so the user cannot click inside the instructional fields.

This approach provides an excellent overview of the search tool. However, one slight improvement might be to emphasize the difference between the actual search area and the instructional search area. Using a different background color or enclosing the help area in a box might reduce user confusion.

**Search Our Sale Items**  
These results will only include sale merchandise.

Keyword(s) For example: pants or evening bag  
Price Range Select Category  
Designer Size **SEARCH**

[Sign up for email updates](#), and you'll be one of the first to know about our upcoming sales.

**SALE SEARCH**  
It's easy to find what you're looking for with our Sale Search. Enter as many fields as you wish. Remember: If you enter more search criteria, you will receive fewer (but more accurate) results.

**Keyword(s)**  
Type in a word or phrase.  
For example: Pants or evening bag

**Price Range**  
Select the price range.  
For example: Under \$300

**Category**  
Select the category.  
For example: Women's Apparel

**Search Our Sale Items**  
These results will only include sale merchandise.

Keyword(s) For example: pants or evening bag  
Price Range Under \$300 Category Women's Apparel  
Designer kate spade Size Medium **SEARCH**

**Designer**  
Type in the designer you're looking for.  
For example: kate spade

**Size**  
Enter the size you want.  
For example: Medium

**Search**  
Click here to start your search.

## Conclusion CONTENTS

Each display option has strengths and weaknesses, and this article is not meant to suggest that any of the display options should only be used for only one type of information. The examples represent best practice uses for each option that capitalize on their strengths. I encourage you to use these examples and ideas as a starting point as you design your UA systems. Most of all, I hope that you see the benefits of combining these embedded UA display options with an external help system to better meet your users' needs.

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[Scott DeLoach](#) is a founding partner of User First Services ([www.userfirst.net](http://www.userfirst.net)), an Atlanta-based consulting company that specializes in designing and creating user assistance. Over the last 12 years, Scott has presented over 60 papers on web-based Help, interface design, embedded user assistance, usability, and JavaScript coding at conferences across the US and Canada, and around the world. He has been developing online Help systems since 1992 and is a certified RoboHelp instructor. Scott holds a Master's Degree in Technical and Scientific Communication from Miami University.



Scott will be presenting an expanded version of this article—"Developing Embedded User Assistance for Web-based Applications"—at the 2004 WritersUA Conference.

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