

Writing Better Help Topics: The Seven Kinds of Help Information

BY DAVE FARKAS

Writing Help consists largely of choosing the appropriate content to present to users. This means not overlooking information that may be relevant and, when considering candidate information, making the best possible decisions as to what to include and what to leave out.

Because computer documentation is a very specific kind of writing, we can usefully classify Help content. Almost all the information we provide falls into one of the seven categories shown in Table 1.

You can use this classification as a brainstorming tool so that you don't overlook information you might want to include in your Help system. Also, if you understand the nature and role of each category of Help information, you are better equipped to decide which items of candidate information to include or leave out.

In the following discussion I focus on procedure topics, the mainstay of standard Help systems. But this classification applies to command topics, overview topics, and other kinds of topics regularly found in standard Help—and also to special kinds of Help such as wizards and cue cards. In fact, this classification can reveal the underlying similarity among the forms of Help that look very different from one another.

Purpose and Actions

Of the seven kinds of Help information, purpose and actions are the two most important. Users need to understand the purpose before they will take an action; no one likes to jump off into the darkness. Help topics, therefore, must include purpose and action information, except when such information can be

1. Purpose	The main reason the user is performing a task; the intended result.
2. Actions	Actions that will achieve the intended results.
3. Feedback	Information that confirms that the user has acted correctly and that the system has responded properly.
4. User Options	Variations on the purpose of the procedure that are being suggested to the user.
5. Secondary Results	By-products of the purpose. They are usually routine statements but may include warnings of harmful results.
6. Conditions	Special circumstances or problems that in some way interfere with the outcome of a task. They often lead to unwanted secondary results.
7. System Description	Information about the nature and behavior of the system.

Table 1: Seven categories of Help information.

readily inferred by users. Every procedure topic begins with a topic title heading, for example "Downloading Files," which is a brief statement of purpose. Procedure topics contain two other components whose main role is to convey purpose information. These are the conceptual element and the infinitive subheading.

Once the user understands the purpose of the procedure and decides that the purpose matches his or her goals, the user wants to carry out the actions. Action information very often appears in steps: steps contain an action statement (a verb plus an object) and, most often, some kind of modifying phrase or clause, as shown in the example:

When the Installation Complete message appears on your screen, click OK.

The verb is "click," the direct object is "OK," and there is a modifier expressing time. The components that make up procedure topics are shown in Figure 1. A more complete discussion of these components can be found in volume 1, (Winter 1994) of this journal, "The Design of Procedure Topics."

The Five Other Kinds of Help Information

Our interactions with computers are too complex for us to document software (and hardware) products with

only purpose and action information. Five other kinds of information are also necessary.

Feedback

Feedback appears directly after action information. It provides users with assurance that they have performed the correct action and that the system has responded properly. This step shows feedback information in its simplest form:

- 1 Click the vertex whose position you want to change.
The vertex turns magenta and the pointer changes to a four-headed arrow.

Computer users, however, do not necessarily need explicit feedback statements like the one above to tell them that they are on track. Other kinds of Help information can provide feedback. In the following example, the action statement in Step 2 includes a modifier that shows the location of the action in Step 2. But this modifier does double-duty, for it provides feedback for the action statement in Step 1:

- 1 On the Options menu, choose Resources and Costs.
- 2 In the Resources and Costs dialog box, choose Assign Workloads.

As we will see below, secondary results can also provide feedback. Occasionally Help authors provide negative feedback information that assists users in recognizing a problem.

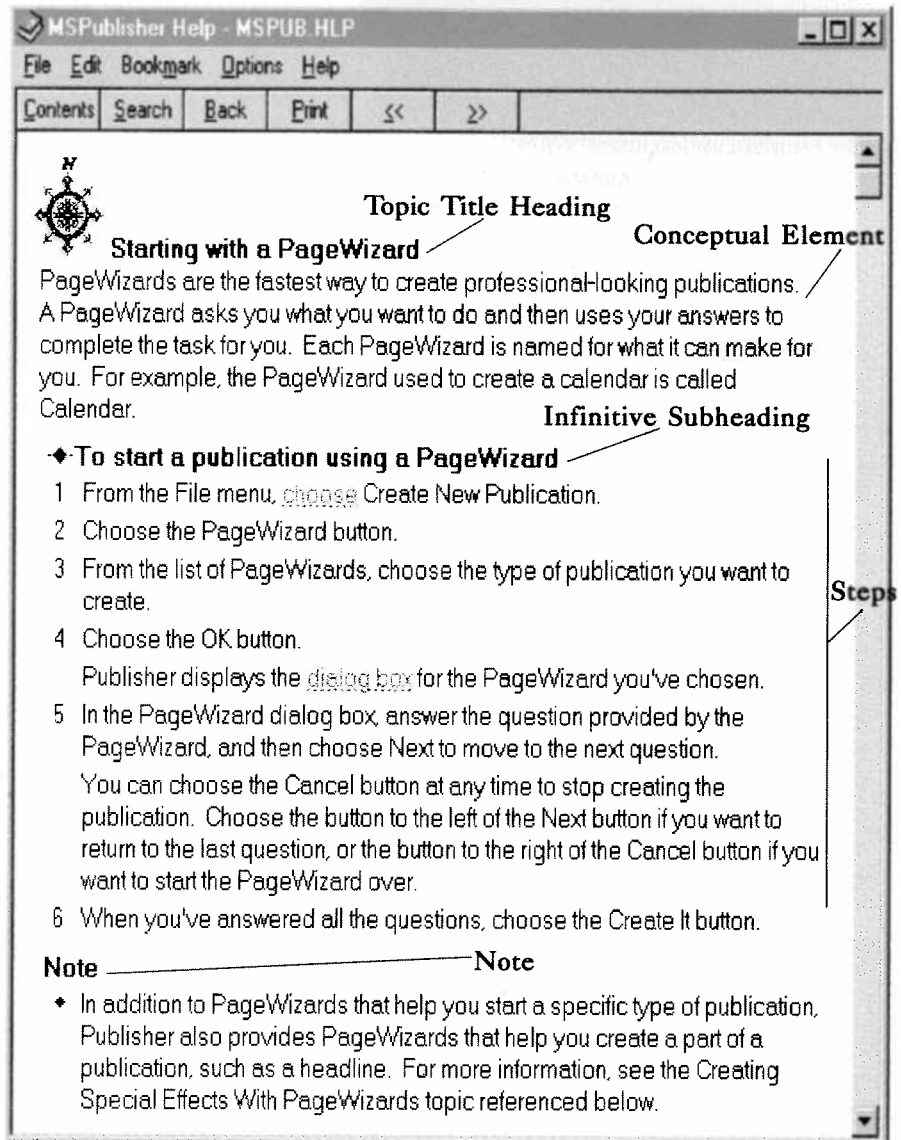


Figure 1: The components of a procedure topic.

User Options

Complex software products routinely offer users optional variations on the primary purpose of the tasks they perform. This fact is reflected in the documentation. Procedure topics, for

example, often have steps that convey user options:

To download your files in compressed form, click Compression.

Writing Better Help Topics: The Seven Kinds of Help Information (Continued)

This step is simply an optional variation on the main purpose of the procedure, "Downloading Files." User option information also appears frequently in the conceptual element and in notes. Whenever documentation contains phrases such as "If you want to" or "You can," the writer is presenting a user option.

Secondary Results

Users carry out computer tasks to achieve a purpose. But because of the complexity of computer systems, secondary results often occur along with the main purpose of the procedure. Secondary results are usually routine: they may be too unimportant, too obvious, or even too deeply buried in the internal operations of the system to mention. On the other hand, documenting them may give the user a richer understanding of how the task at hand fits the broader context. For example, in this conceptual element for the procedure topic "Inserting a manual page break," users benefit from this statement of a secondary result:

When you insert a manual page break, QuickWriter automatically adjusts the automatic page breaks that follow.

Notice, however, in Figure 2, how another Help author is using the same secondary result to provide the user with feedback after the action statement in Step 3.

Conditions

Conditions are special circumstances or problems that in some way interfere with the outcome of a

task. Some conditions are expressed as statements directed at all users, often as simple prerequisites. For example, users may be told that they cannot dial up a host computer without first configuring their data communications software. Other conditions only apply to smaller groups of users who are in a particular system state:

If you are in the Transactions module, switch to the Report module to format and print the report.

When a condition is not addressed, it may be impossible for the procedure to go forward. There is no way to print a report from the Transactions module.

In other cases, the procedure can go forward, but the result is not fully successful:

- If the edges of the scanned graphic are blurry, choose sharpen Edges.

The user is certainly free to ignore this condition and proceed with the task, but the graphic will be of inferior quality. In some cases, the procedure can go forward with the condition unaddressed, but there will be an unwelcome secondary result. In the following example, the condition is that the user has an existing file with the same name as the file being archived. The unwelcome secondary result of archiving the new file is losing the existing file:

Caution

If you archive a file into a folder that already contains a file with the same name as the file being

archived, the existing file will be replaced automatically by the new one.

Notice that this condition exists only when users want to keep the existing file. For users who want to conveniently delete older versions of a file, there is no potential problem at all. This relationship between conditions and secondary results occurs all the time in the world beyond computers. For example, I might turn on an overhead transparency projector and not notice (or not care) that the cooling fan is not working. I can proceed with my task, but with the unaddressed condition of the broken fan, I will not be fully successful in completing this task, because I am overheating the transparency projector.

System Description

Task-oriented information focuses on user goals, the results users want to achieve. System description information concerns the make-up or function of a software (or hardware) product. It may pertain to either the internal workings of the product or to its user interface. Task orientation is an important principle in documentation; and, indeed, much of the dysfunctional documentation written in the past focused on the internal workings of computer systems rather than the goals of users.

Some types of system description, however, can be highly functional. Although telling a user that input is stored in a particular buffer is probably unwarranted, telling a user that a certain field can accept only numbers is a very useful system description.

What's This? and command topics provide functional descriptions of

some aspect of the interface. Users easily infer the connection between the system description and their own purposes. For example, the What's This? topic shown below identifies an interface element and describes its function:

This button formats the selected text as boldface.

The user, however, can mentally transform this functional description into a purpose and action statement: "To format the selected text as boldface, click Bold."

A Case Study

In this case study, a Help author uses this classification to improve the following step:

To complete the box, click the bottom edge of the border model.

The classification reveals that the step is an action statement with a modifier. The modifier looks like a user option, but it is really a purpose statement. In other words, short of canceling the entire procedure and not creating a box, the user's only choice is to complete the box. Although purpose information normally appears in the topic title heading, conceptual element, and infinitive subheading, we sometimes explain the purpose of an individual step, especially when one step completes a series of actions. Having identified the problem, the Help author soon figures out a solution:

Click the bottom edge of the border model to complete the box.

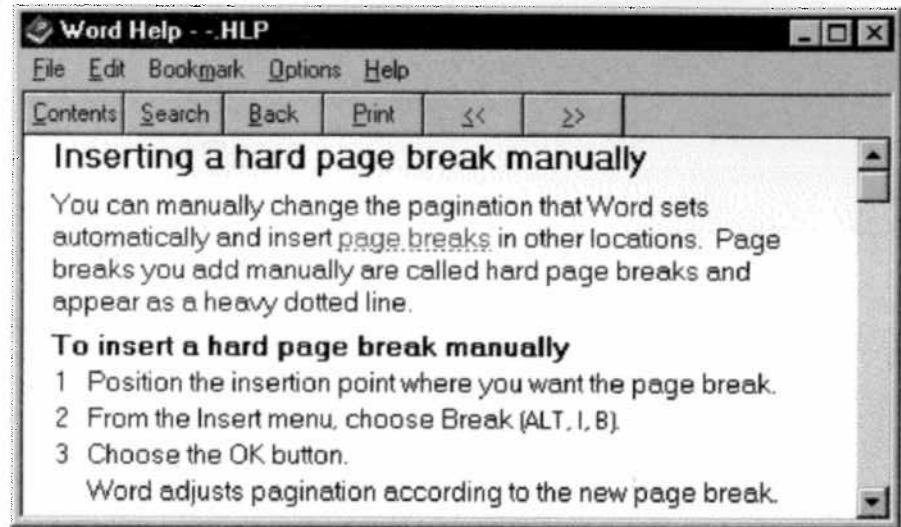


Figure 2: A secondary result used as feedback (Step 3).

When the "to" clause **follows** the action statement, it more strongly expresses purpose rather than a user option.

Here and in many other situations this seven-part classification is a good tool for the Help writer. With a deeper understanding of the nature of the information we put into Help, you will write Help topics that more fully satisfy the needs of your users.

Dave Farkas is an associate professor in the Department of Technical Communication at the University of Washington. He is active as a researcher and teacher in the area of computer documentation