

Editing Online Help Text: Strategies and Tips

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Types of Online Help

- **Traditional online help**
 - Searchable, indexed help content
 - Wizards
 - Context-sensitive help
- **Embedded online help**
 - Included in the software's interface, windows, or dialog boxes
 - Available when and where users need it while they use the software

Online Writing Issues

Problem: Readers have difficulty visualizing the size and complexity of an online document and how its topics are related.

Solution: Create an effective document structure that is obvious and easy to navigate.

Online Writing Issues

Problem: Text is more difficult (and unpleasant) to read online. So, readers become frustrated when they cannot quickly find what they are looking for.

Solution: Write short, self-contained topics. Also, construct simple, scannable text.

Online Writing Issues

Problem: Readers usually jump to a topic of interest. Without context from previous reading, they can easily become disoriented.

Solution: Preserve context to keep readers oriented.

Online Writing Issues

Problem: Links can be annoying, especially when the content and value of the material available at the link destination is unclear.

Solution: Construct effective links.

Sun's Online Writing Team

- **The team's goals:**
 - **To provide consistency for online documents produced by various internal writing groups at Sun**
 - **To improve the usability and readability of Sun's online documents**
- **The team and my role in it**
- **The result: two new chapters in the *Sun Editorial Style Guide***

Categories of Guidelines

- **Structure and Navigation**
- **Link Strategies**
- **Link Text**
- **Online Writing Style**

Structure and Navigation

Does the text use a meaningful, easy-to-follow structure?

- **For tasks, organize by task.**
- **For other information, organize by hierarchy and use:**
 - **Inverted pyramid writing style**
 - **Tables**
 - **Flow diagrams**

Example: Task Map

Task Map: Managing File System Quotas

Task

1. Configure a file system for quotas.

Description

Edit the `/etc/vfstab` file to activate quotas each time the file system is mounted. Then, create a quotas file.

2. Set up quotas for a user.

Use the `edquota` command to create disk quotas and inode quotas for a user account.

3. (Optional) Set up quotas for multiple users.

Use the `edquota` command to apply prototype quotas to other user accounts.

Structure and Navigation

Does the content enable readers to visualize the structure?

- **Is there a visual map of the online help structure? A clickable TOC?**
- **Are headings, subheadings, and topic titles sufficiently descriptive?**
- **Do jump lists link to related topics?**
- **Is the visual design consistent?**

Example: Jump List

You can perform the following optional procedures to maintain user and group accounts:

- Modifying a group
- Deleting a group
- Disabling a user account

Structure and Navigation

Does the use of links follow a consistent strategy? Regarding:

- **Amount of control readers have over the topics they can follow**
- **Types of links**
- **Placement of links**
- **Number of links used (without underlinking or overlinking)**

Structure and Navigation

To avoid underlinking, ask:

- **Are the reader's likely paths (and questions) anticipated?**
- **Are associations that would benefit readers provided?**
- **Do their needs, expectations, and interests guide the link choices?**
- **Are priorities set so that readers are pointed in relevant directions?**

Link Strategies

To avoid overlinking, ask:

- **Is the same text NOT linked repeatedly?**
- **Is the number of required clicks minimized?**
- **Is internal linking within a topic minimized?**

Example 1: Don't Overlink

Incorrect: Volume Manager uses virtual disks to manage physical disks. In Volume Manager, a virtual disk is called a volume.

Correct: Volume Manager uses virtual disks to manage physical disks. In Volume Manager, a virtual disk is called a volume.

Example 2: Don't Overlink

Incorrect: If you used Wrap to Fit, the Save dialog box includes another choice for handling line endings (see Wrap to Fit).

Correct: If you used Wrap to Fit, the Save dialog box includes another choice for handling line endings.

Example 3: Don't Overlink

Incorrect: For related documentation on Application Builder, [click here](#).

Correct: For related documentation on Application Builder, see the [dummy\(1\)](#) man page and the [Application Builder User's Guide](#).

Example 4: Don't Overlink

Incorrect: Table 1 shows the dummy command options. *(The table then immediately follows this text.)*

Correct: The following table shows the dummy command options.

Link Strategies

When traversing links, can readers stay oriented without feeling lost?

- **Is link formatting reserved for links only?**
- **Are navigational icons labeled?**
- **Do links have sufficient context?**
- **Are readers warned about unexpected link destinations?**

Example: Keep Readers Oriented

Incorrect:

Pico is probably the easiest of the three editors to use. If you want to learn about the other editors, however, see the reference cards for VI and Emacs.

Example: Keep Readers Oriented

Correct:

Pico is probably the easiest of the three editors to use. If you want to learn about the other editors, however, see:

- VI Reference Card from Dalhousie University
- Emacs Reference Card from www.geek-girl.com

Link Strategies

Do links condense the amount of information readers see?

- **Does the text use summaries with links to supporting details?**
- **Does the text link to, rather than duplicate, information?**

Example: Summaries

By default, the Console has three panes, four horizontal bars, and two tabs:

- Navigation Pane
- View Pane
- Information Pane
- Menu bar
- Tool bar
- Location bar
- Status bar
- Context Help tab
- Console Events tab

Link Strategies

When possible, are links provided in lists or at the end of a topic?

- **Are links embedded in the text only when necessary?**
- **Are links in lists annotated when more context is needed?**

Example: Links in a List

Incorrect:

The installation of the application server is affected by the following resource issues: unique network ports, shared directory configuration trees, shared Java environment, and login.

Example: Links in a List

Correct:

The installation of the application server is affected by the following resource issues:

- Unique network ports
- Shared directory configuration trees
- Shared Java environment
- Login

Example: Links at End

Incorrect:

You can install the application server by using `setup.exe` or `ezSetup.exe`. The `ezSetup` method provides an easy installation without requiring various inputs. For more information, see [Using ezSetup](#). However, this topic covers the `setup.exe` installation options: Express, Typical, and Custom. The Typical option is the default.

Example: Links at End

Correct:

You can install the application server by using `setup.exe` or `ezSetup.exe`. This topic covers the `setup.exe` installation options: Express, Typical, and Custom. The Typical option is the default.

For an installation that does not require various inputs, use the `ezSetup` method.

Link Strategies

Have you (or someone else) tested the validity of all links?

- **Internal links (within the online help)**
- **External links (outside the online help)**

Link Text

Is there sufficient context in link text and surrounding text?

- **Do links serve as guideposts when readers scan them?**
- **Where possible, does explanatory text precede the link text?**

Example: Link Text

Incorrect: Appendix F identifies the system components.

Correct: For a list of the Sun Enterprise 3500 system components, see Appendix F, Illustrated Parts Breakdown.

Link Text

Is the link text woven into the sentence structure?

- **Is the text of the link meaningful and part of the natural syntax of the sentence?**
- **Does the link text NOT refer to the mechanism of the online display tool, as in “click here”?**

Example: Link Text

Incorrect: Click here for more information about Solstice Messaging Manager.

Correct: For more information, see Solstice Messaging Manager.

Example: Link Text

Incorrect: To set preferences, click here, and then proceed with this task.

Correct: Set preferences and then proceed with this task.

Link Text

Are key words or phrases chosen for the link text?

- **Does the link text best represent the content of the destination?**
- **When possible, does the link text correspond to a reader's search task?**
- **Is the link text the right length?**

Example: Link Text

Key words chosen for link text:

User Accounts sets up the user's home directory and sets the file permissions, based on the user's primary group.

Example: Link Text

Link text corresponds to search task:

Enter the number of rows and columns you want. This option is available only when you are creating a new table. You can also add rows and columns to an existing table.

Link Text

Is the link text scannable?

- **Is the link text written as if the reader were scanning only the links on the page?**
- **Is the link text conceptually similar to titles or headings, where possible?**

Example: Scannable Link Text

Incorrect:

There will be an online chat on the Java API for XML Parsing (JAXP) on Tuesday, February 25, at 11:00 a.m. Pacific Daylight Time. The guests are James Davidson, Sun architect-XML technologies, and XML parser guru Rajiv Mordani. To join the online chat, go here.

Example: Scannable Link Text

Correct:

Join the online chat on Java API for XML Parsing (JAXP) on Tuesday, February 25, at 11:00 a.m. Pacific Daylight Time.

The guests are:

- James Davidson, Sun architect-XML technologies
- Rajiv Mordani, XML parser guru

Online Writing Style

Does the text support nonsequential, sporadic reading?

- **Are topics short, self-contained?**
- **Are topics understandable if read out of sequence?**
- **Do links offer sufficient context?**
- **Do topics use transitions?**

Example: Use Transitions

Incorrect:

<head2> How the TS Environment Protects Against Intruders

The TS environment protects against intruders by providing accounts that require user names with passwords. They can be created by users or be system-generated, according to your site's security policy. You can require that passwords be changed regularly.

Example: Use Transitions

Correct:

<head2> How the TS Environment Protects Against Intruders

TS protection includes accounts that require user names with passwords.

Passwords can be created by users or can be system-generated, according to your site's security policy. You can **also** require that passwords be changed regularly.

Online Writing Style

Are paragraphs, headings, and lists easily scanned?

- **Are paragraphs short?**
- **Are headings meaningful?**
- **Are lists used as often as possible?**
- **Are key words and phrases (cautiously) emphasized in bold?**

Online Writing Style

To keep paragraphs short:

- **Limit each paragraph to one idea.**
- **Put the topic sentence first.**
- **Emphasize main points.**
- **Use lists.**
- **Have no more than 3–5 sentences.**
- **Limit to 75 words or less.**

Example: Short Paragraph

Incorrect: Select Preferences in the Console menu to display the Preferences dialog. Click on a tab in the dialog to designate preferences for the following: Console, Appearance, Toolbar, Fonts, Tool Loading, and Authentication. See To Open a Server Toolbox or To Open a Local Toolbox for information about how Console, Tool Loading, and Authentication settings affect Solaris Management Console functions.

Example: Short Paragraph

Correct: To set preferences, select Preferences in the Console menu. Then, click on a tab in the dialog to designate preferences for the following:

- Console
- Appearance
- Toolbar
- Fonts
- Tool Loading
- Authentication

For information about how the Console, Tool Loading, and Authentication settings affect Solaris Management Console functions, see:

- To Open a Server Toolbox
- To Open a Local Toolbox

Online Writing Style

To make headings meaningful:

- **Avoid generic headings.**
- **Make them precise, short abstracts of their associated content.**
- **Reflect the reader's perspective.**
- **Place most important words first.**
- **Use qualifiers, if appropriate.**

Examples: Headings

View Pane Display

How to Filter the View
Pane Display

Commands

Commands Used to
Manage Accounts

User Templates

Templates for Creat-
ing User Accounts

Elements of Sol-
stice Availability

Solstice Availability
Features

Optimizing for
I/O

Optimizing I/O Disk
Performance (Tasks)

Online Writing Style

To facilitate scanning with lists:

- **Use lists to break up long paragraphs.**
- **Avoid having more than nine list items.**
- **Use concise phrases, when possible.**
- **Use the list summary method.**

Example: List Summary

- Use concise phrases in lists.
Concise phrases are easier to scan than complete sentences. Also, lines are less likely to wrap in a window when you use phrases.
- Summarize the next point.
Explanatory text ...

Online Writing Style

To emphasize text using bold:

- **Use emphasis cautiously.**
- **Emphasize key, informative words.**
- **Avoid emphasizing words in every paragraph.**

Example: Using Bold

A toolbox can include folders, tools, and links to other tool boxes.

A **folder** is a container for grouping tools within a toolbox.

A **tool** is a compatible application that integrates seamlessly into the Console. A Console tool is built using the Console Software Development Kit.

A **toolbox link** is a pointer to another toolbox that might be on the current Console server.

Online Writing Style

Is the text as clear, simple, and concise as possible?

- **Does the text use simple declarative and imperative sentence structures?**
- **Does the text use active voice, present tense, and concrete, meaningful words?**
- **Are terms used consistently?**

Example: Simple Text

Incorrect: Note that the Console will be displayed quickly if you elect to display the Console without loading tools first, but that you will be asked to log in when you first select a tool on a server. If you choose to load all tools before displaying the Console, you will need to log in before the Console is displayed; if more than one server is referenced in the toolbox, you will have to log in multiple times.

Example: Simple Text

Correct: If you elect to display the Console without loading tools first, the Console is displayed quickly. However, you must log in when you first select a tool on a server.

If you elect to load all tools before displaying the Console, you must log in before the Console is displayed. If the toolbox contains more than one server, you must log in multiple times.

Online Writing Style

Is unnecessary material eliminated?

- **Unneeded definitions, explanations, or information that is too technical**
- **“Nice-to-know” information**
- **Flowery language**
- **Redundant introductory text**
- **Redundant figure callouts**

Online Writing Style

Is the inverted pyramid style used?

- **Conclusion and summary of main ideas at beginning of topic**
- **Details follow in decreasing order of importance**
- **Clear, meaningful headings or lists at beginning of topic**
- **Separate paragraphs or topics to emphasize main points**

Online Writing Style

Is context preserved to keep readers oriented?

- **Have few assumptions been made about reading order?**
- **Are contextual cues provided?**
- **Is the precise location of related information given?**
- **Are pronouns used carefully?**

Example: Preserve Context

Incorrect:

<heading> Demo Programs

You can find demo programs in /usr/dt/examples/dtbuilder. See the README file for detailed information about them.

<heading> Related Documentation

For more information about this, see the APP Builder help volume and the Application Builder's User's Guide.

Example: Preserve Context

Correct:

Previous Topic: Developing an Application

<heading> Application Builder Demo Programs

You can find Application Builder demo programs in the /usr/dt/examples/dtbuilder directory. See the README file for detailed information about these programs.

<heading> Application Builder Documentation

For more information about Application Builder, see the Application Builder help volume and the Application Builder's User's Guide.

Next Topic: Designing and Maintaining Portable Applications

Online Writing Style

Are tables optimized for online display?

- **Are tables short and simple?**
- **Are the number of columns and rows limited?**
- **Do table cells contain as few words as possible?**
- **Are tables, instead of bulleted lists, used when appropriate?**

Online Writing Style

Are words, phrases, and symbols readable?

- **Are only standard, easily read symbols used?**
- **Are abbreviations used sparingly?**
- **Are ANY small words that can change the sentence's meaning emphasized in some way?**
- **Contractions . . .**

Common Pitfalls

- **Dumping print documents online.**
- **Providing sparse content.**
- **Not supporting links with sufficient context. Also, “Click here” links.**
- **Dead links!**
- **Writing complex sentences filled with jargon and unclear references.**
- **Forcing readers to read to the end for the main point or conclusion.**

Develop Your Own Guidelines

- **Work on a company-wide team and aim to reach consensus on everything.**
- **Research online writing, discuss your findings, and adopt the guidelines that make sense for your organization.**
- **Write a style guide that demonstrates its own guidelines. Provide many examples.**
- **Enlist reviewers outside your team.**
- **Evangelize!**

Online Help Resources

- **Embedded Help: Background and Applications for Technical Communicators, Deborah S. Ray & Eric J. Ray. Technical Communication, Feb. 2001. Also available in TECHWR-L at:
<http://www.raycomm.com/techwhirl/magazine/technical/embeddedhelp.html>**
- **The Five W's of Online Help, Geoff Hart. TECHWR-L. <http://www.raycomm.com/techwhirl/magazine/technical/5wsonlinehelp.html>**
- **Is Your Help System Usable?, Donna Timpone. Hyperviews. <http://www.stcsig.org/oi/hyperviews/archive/PrintHPV/344.htm>**

Online Help Resources

- **Specifying Standards for Topic Length, Neil Perlin. Hyperviews.**
<http://www.stcsig.org/oi/hyperviews/archive/01Fall/014cmagi.htm>
- **Issues in Link Planning and Design, Neil Perlin. Hyperviews.**
<http://www.stcsig.org/oi/hyperviews/archive/02Winter/021cmagi.htm>
- **Designing and Writing On-Line Documentation: Hypermedia for Self-Supporting Products (2nd Ed). William Horton (1994).**

Online Writing Resources

- **My personal web site:**
<http://homepage.mac.com/alysson/webfolio.html>
- **My annotated list of online writing resources:**
<http://homepage.mac.com/alysson/htresources.html>
- **Writing for the Web and Creating Effective Online Content: An Interview With Online Writing Expert, Amy Gahran.** <http://webword.com/interviews/gahran.html>
- **The Seven Qualities of Highly Successful Web Writing, Kathy Henning.** http://www.clickz.com/design/onl_edit/article.php/833861
- **Effective Web Writing, Crawford Kilian.**
<http://www.newarchitectmag.com/archives/2001/02>
- **Web Writing Sites, Janice Gelb.**
http://www.geocities.com/j_gelb/web-writing.html

Q&A

Thanks for your attention!

If you have any suggestions for editing online help text or other types of online documents, please email me:

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