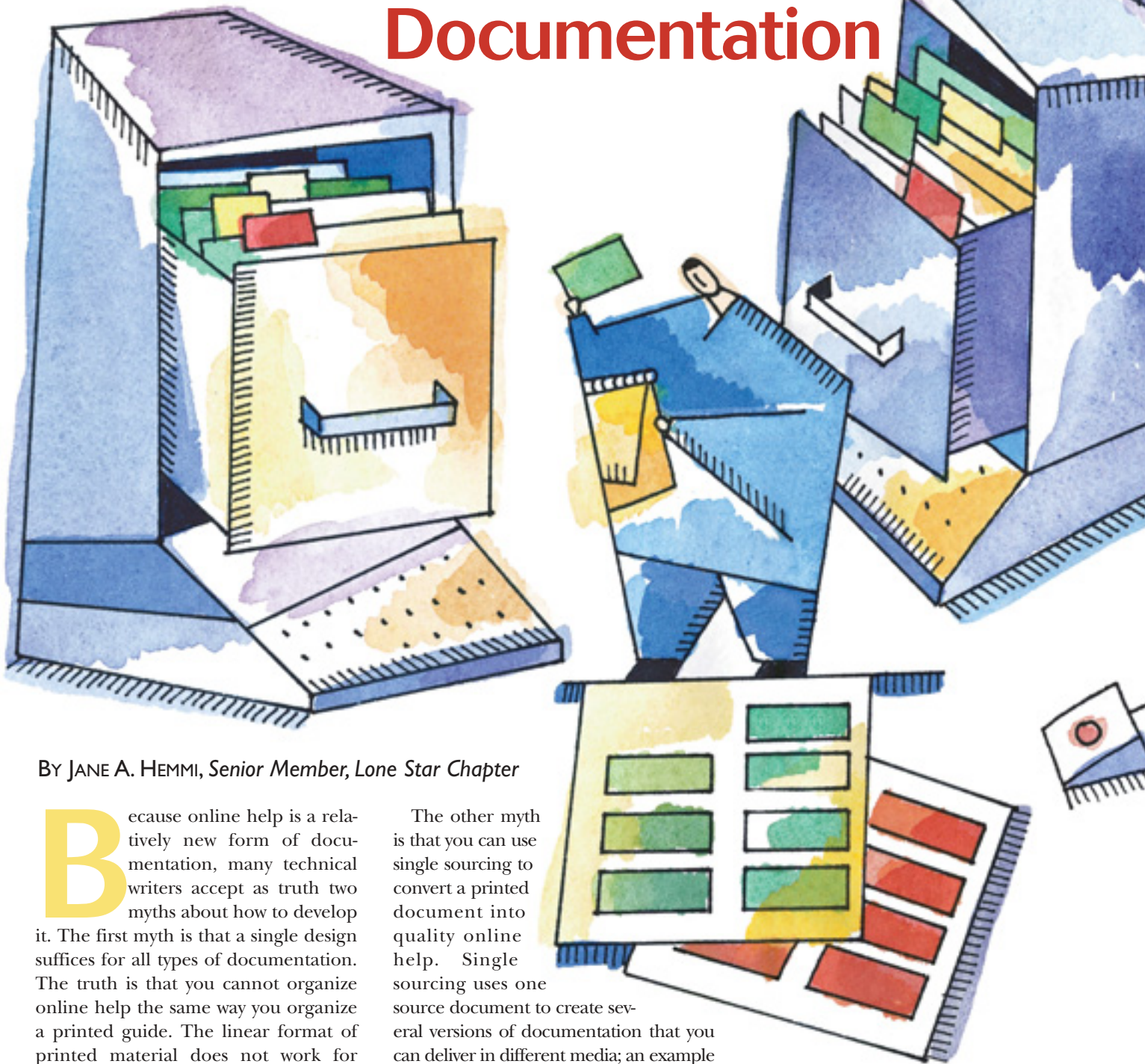


Differentiating Online Help from Printed Documentation



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Because online help is a relatively new form of documentation, many technical writers accept as truth two myths about how to develop it. The first myth is that a single design suffices for all types of documentation. The truth is that you cannot organize online help the same way you organize a printed guide. The linear format of printed material does not work for online help, which requires you to chunk information in individual topics. Users move through the system by clicking hyperlinks, a method of navigation that doesn't rely on linearity.

The other myth is that you can use single sourcing to convert a printed document into quality online help. Single sourcing uses one source document to create several versions of documentation that you can deliver in different media; an example of single sourcing is converting a printed manual into a PDF. Single sourcing has its advantages, such as decreasing development time, cutting costs, and maintaining consistency for a single documentation set.

However, when you single source, the documentation you deliver does not meet the unique criteria for each documentation medium. Converting a manual to PDF is an easy way to deliver printed material and



enables users to easily access cross-references. But a true online help system is not linear, and you cannot create it from a printed guide without modifying the layout to meet the unique medium of online help.

Defining the Differences

Although online help and printed documentation both provide information to end-users, they are different mediums, requiring unique writing styles and structures. When you write online help, you must be aware that the computer screen displays smaller amounts of information than a printed page: Material that fits on one printed page might require three to six screens online. Also, the formatting choices you select for printed material might be inappropriate for online help. You need to carefully consider how you organize your material, select fonts, use color, and incorporate hyperlinks.

Organizing Material

Printed documentation follows a page-by-page format, while online help follows a non-linear format. When you write online help, you use a hypertext medium to navigate through material. Users of online help invent their own text and discover combinations, relationships, and chains of knowledge that you cannot

demonstrate in printed material. Therefore, online help is a flexible, modular, powerful tool for accessing information.

Selecting Fonts

Many fonts appropriate for paper do not work well on a computer screen. Some font styles and sizes for printed material are too small for reading on a screen. Stylized, cursive, italicized, and decorative typefaces are difficult to read online. The most conservative choice for online help fonts is to use the same sans serif font for all text while changing the size, weight, and color for emphasis.

Using Color

To save money, most companies print manuals in black type on white paper. But there is no extra cost for color in online help, so you need to learn how to use it effectively.

Color makes your topics more attractive, but you shouldn't use it for this reason alone. Each color must have a purpose—for example, to indicate different types of information and levels of headings. Consistent use of color is one way to familiarize users with the design of the system. Color can also highlight significant information. Choose colors within the same family to avoid hard-to-read combinations (such as red text on a blue background). If the main color for your online help is green, you can use varying shades of green and complementary colors, including yellow and blue.

Using Hypertext

Online help incorporates a different form of cross-referencing than printed documentation; that is, it uses hypertext. When you create hypertext, you provide data through a network of hyperlinks. With hyperlinks, you can reuse information in a variety of circumstances for both expert and novice users. In the online help system my company produces for one of its products, for example, there are many instances where we instruct readers to open a specific application. Instead of repeatedly listing the opening steps, we opted to provide a pop-up link containing the steps to complete the instructions. This way, if users already know how to open the application, they

can bypass the pop-up and move on.

You do not have to use a specific color for hyperlinks. On *Internet Explorer* and *Netscape*, the two most popular browsers, the default colors are blue for unvisited hyperlinks and purple for visited hyperlinks, but you can use any colors as long as you clearly identify hyperlinks within your color scheme.

Building an Online Help System

Using hypertext requires you to think of information as discrete topics linked together, rather than as a linear progression. Therefore, you need to learn to design and write online help differently. The many issues to consider when you create an online help system include developing your own online help style guide, establishing a screen layout, writing effective topics, creating a good table of contents and index, and testing your online help.

Developing an Online Help Style Guide

If you produce both printed and online documentation, you need separate style guides for each medium. Your online help style guide must define spelling and capitalization rules, if they differ from those you apply in print; ensure consistent formatting of similar topics; and establish standards for screen layout, font, and voice. The style guide must require sans serif fonts and simple, active-voice, present-tense sentences. By addressing writing styles and structures, the style guide ensures that the final product looks and sounds as though a single person wrote the entire system, even if multiple writers contribute to it.

The style guide must also provide guidelines for writing procedures. In many ways, writing procedures for online help is similar to writing them for print. The difference involves steps such as "Click OK and the XYZ window opens." A book would show a graphic of the XYZ window, but placing a graphic in the middle of an online help topic takes up far too much space. In this case, your online help style guide should instruct help developers to create a hyperlink to the XYZ window topic.

Another important issue to cover in a style guide is the use of acronyms. Your

tools of the trade

style guide must provide rules about coining acronyms and linking them to glossary terms. Because acronyms tend to appear repeatedly in procedures, linking each appearance results in unsightly pages full of hyperlinked text. The style guide can help you avoid this problem by stipulating that you need to link acronyms only when they first appear in major topics.

Establishing a Screen Layout

Online help, like printed manuals, has a template. You set your template by developing a consistent screen layout. Be sure to place navigation buttons, headings, and example links consistently for all topics. Each category of information must have a unique appearance on the screen, with the same fonts, margins, indents, colors, and graphics. For example, every procedure topic should follow the same screen layout.

It's important to establish appropriate metaphors because they allow users to associate the unfamiliar application interface with a familiar situation. When you use icons for notes, warnings, and special instructions, you create symbols or metaphors for this type of information. Use consistent formats to present this information in online help. For example, each note should have the same format, so that users will become familiar with how you present notes. Familiarity improves usability.

If applicable, provide instructions for displaying information in a browser. You cannot control which font a user selects, but you can recommend the settings that are best for viewing the online help.

Writing Effective Topics

Carefully written topics prevent users from getting lost in hyperspace. When you write online help, you need to select pieces of information and build them into a topic, and then link the topics together. This structure facilitates navigating online. Provide conditional blocks (prerequisites) to assist users with completing tasks when the sequence of information is not obvious. For example, each procedure in an online help system my company produces includes a list of actions, under the heading "Prerequisites," which users must perform before beginning the procedure.

For procedures, make sure you furnish your users with overview information that explains the purpose of each step. Use

simple, short purpose statements to help users determine whether they are viewing the appropriate procedure for their needs. Users who know why they're performing a task learn the process more quickly. Make sure you clearly explain each element on a screen—radio buttons, drop-down menus, text fields, and so on. Comprehensive element definitions are among the most common and important pieces of online help.

The most important standard for writing effective topics is to keep information straightforward. Users viewing a topic with too much information are not likely to read it. A simple, chunked topic invites users to read the material without an excessive amount of scrolling.

Creating a Table of Contents and Index

Many online help software applications enable you to use a wizard to create a table of contents (TOC) and index based on your topics. The results are less than appealing for users. When you auto-generate a TOC for online help, the application typically places topics either in the order you created them or in alphabetical order, neither of which is particularly user-friendly.

Take the time to manually create your TOC. Follow the online help style guide standards for organization and capitalization. Establish your TOC sequentially instead of alphabetically. Users do not know the sequence of procedures in the online help until you show it to them in the table of contents.

You also need to create a comprehensive index. In online help, users often turn to the index to locate information. Wizards offer many options for generating indexes, but the results leave something to be desired. For example, a wizard-generated index for one of my help projects listed "Cancel" and "Cancel Button" as entries. A more descriptive entry, such as "canceling xyz," would allow users to decide whether they want to view this particular topic. Wizard-generated indexes also tend to be haphazard with gerunds—for example, sometimes an index will list "view" as a first-level entry, and sometimes it will list "viewing."

As with the TOC, you should manually create your index and follow the online style guide for organization and capitalization. Make sure there are multiple

ways to locate the same information so users can find what they need.

Testing Your Online Help

Reserve sufficient time for testing your online help. At a minimum, test every hyperlink, button, and menu choice. Try recruiting someone outside of the writing team in addition to the writers to test the online help. Develop a testing procedure to ensure that you access every topic in your online help system.

The Result

The ultimate goal is to give your customers the best documentation by using the appropriate standards and styles for each medium. Many companies single source to create both online help and printed documentation. You can currently use single sourcing either by creating an online help system and converting it to printed material, or by creating printed material and converting it to online help. But when you use one of these methods, you are not addressing the unique criteria for each medium.

Perhaps one way to single source *and* meet the unique criteria for each medium is to develop a tag-enriched repository of raw data. The tag information in the repository would contain meta tags directing source compilers about which information to pull from the repository based on the target presentation format. This scheme would allow for a single corporate repository that reduces cost and depends on software applications to extract the information and build the target presentation format. But it still requires planning and specially designed software applications to generate and meet the criteria for online help and printed documentation. ❶

SUGGESTED READINGS

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