
Help Authoring Guidelines

If you are creating Help for a Microsoft Windows-based application, you may want to follow these guidelines to ensure that your Help file looks and feels to the user the same as the Help they get in standard Windows-based applications such as Program Manager and Cardfile. These guidelines reflect the experience and thinking of current Help authors in all divisions at Microsoft and apply to Help systems using Windows Help version 3.0 or 3.1.

Microsoft Help Guidelines are divided into two parts.

Guidelines

Guidelines	Description
Help Organization	Provides guidelines concerning the organization and structure of Help files.
Formatting and Style	Provides guidelines for controlling the appearance of Help topics.

Note

For writing issues such as punctuation, grammar, and terminology, refer to the *Microsoft Publications Style Guide (MPSG)*, if you have a copy. Otherwise, consult another style manual.

Always consider the completed Help file when planning Help for your product. For example, develop a strategy for using secondary windows that can be consistently used throughout the

Organization

Help file. When possible, work with an online designer to plan such elements as white space, color, leading, and other visual grammar.

If you plan to localize the Help file, work closely with your international team to determine the best localization strategies for your product.

Current Microsoft Help systems include: Help menu, main and sublevel Contents, Indexes, and individual Help topics. This section offers guidelines for each of these elements.

Help Menu

We recommend that Help authors adopt a simple and consistent model for Help menus and include the following standard items on all Help menus:

- ▮ Contents (called “Index” in Help 3.0)
- ▮ Search for Help on ...
- ▮ About <product> ...

The following items are optional and can appear on the Help menu between Search For Help On and About:

- ▮ Index (full alphabetic index)
- ▮ Keyboard Guide
- ▮ How to Use Help
- ▮ Tutorial (or other CBT components; for example, “Cue Cards”)
- ▮ <current context>
- ▮ <product-specific items> (for example, “Lotus 1-2-3,” “Tools”)

Do not use line separators between the initial navigation entries (“Contents”, “Search for Help on...”, and “Index”). Order optional items and insert line separators in whatever way works best for your product.

Contents Screens

4-3

The purpose of the main Contents screen is to present an overview of the information contained in Help and to provide a clear, logical path to information. The Help Contents functions similarly to a table of contents in a book and should follow a similar model. Users are encouraged to use Search, or a separate online index, when they want to look up information as they would in a book index.

Sublevel Contents screens provide a path from the main Contents to individual Help topics. Category entries on the main Contents screen jump to sublevel Contents screens that list either Help topics in that category or other sublevel Contents screens.

- Entries can be listed under separate category headings. For example, reference entries and procedural entries can be separated (Figure 4.1).

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- Entries are presented by category, either as text jumps and/or “hot” bitmaps. List entries should be in learning-path order by frequency of use, or alphabetically (Figure 4.2 shows categories listed in learning-path order).

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- The list of entries on the main Contents screen should be 10 items or fewer. Avoid having more than 15 entries if possible. If your list is longer than 15 entries, you should rethink your Help organization.
- Avoid deeply nested sublevels so the user doesn’t have to jump more than two or three times to display a Help topic.
- On sublevel Contents screens with entries that jump to individual Help topics, avoid long scrolling lists.

Keyword Lists and Indexes

Keyword lists and indexes are used as navigational aids in conjunction with the Contents screens. The keyword list and the index should be similar to each other and follow the same model as a book index.

- Work with a professional indexer to generate the keyword list and

index.

Individual Help Topics

The following guidelines address organizational issues. See the next section, “Formatting and Style,” and the *Microsoft Publications Style Guide* for general writing style guidelines.

- ⁂ Optimally, a Help topic is one, and at most two screens long. A Help screen is defined as approximately one half the width of a maximized window and 15—20 lines long.

You can minimize topic length by breaking information into smaller categories, by using multi-column lists of topics, and by creating pop-up and secondary windows for subordinate information.

- ⁂ Avoid using too many pop-up hot spots on a single screen because they can make the screen hard to read. Each definition should pop up only once, the first time the word appears.

An exception to this may occur in long topics, where an author includes a second definition for users who have scrolled past the first.

- ⁂ Don’t use jumps in running text that replace the topic in the main Help window. If you must use a jump in running text, use a secondary window so the original topic remains displayed in the main Help window.

Other alternatives to embedding jumps in running text are:

- ⁂ Include an embedded text cross-reference and place the jump in the standard location at the end of the topic.
- ⁂ If the running text is a procedure, include enough information in the primary procedure for the user to complete the task.

Formatting and

These formatting and style guidelines address the actual look of the Help topics. If you follow these guidelines and use the style sheet in the Help Authoring Templates (WHAT30.DOT or WHAT31.DOT), your Help topics will look the same as standard Microsoft Help files. Because these guidelines address formatting and style issues only, they should be implemented in conjunction with the Help organization guidelines in the previous

section.

These guidelines assume that you will be using Help Authoring and the Help Authoring Templates. The authoring templates include formatting styles that match the recommendations in the guidelines. Help authors may add additional formatting styles for their project as needed. Wherever possible, additional styles should be based on the existing styles in the authoring templates. A description of the styles can be found in Chapter 5, “Using Help Author.”

Guideline Organization

Each guideline is organized into two sections.

Principles Contains the information you need to follow when authoring Help files.

Guidelines Provides additional information to aid the authoring process.

Included in each section are examples that illustrate the principles and strategies.

Bulleted Lists and Numbered Lists

Bulleted lists are used for series of concepts, items, or options. Numbered lists are used for procedures or sequential lists.

Principles

- ⁂ Use 4-by-4-pixel square bullets. These look best in all video configurations and are different enough from the procedure dingbat (§) to avoid confusion.
- ⁂ Use a hanging indent for list text so that the second line of text wraps flush left with the first line of text.
- ⁂ Use the same text margin (the distance from the left margin to the place where list text wraps) for both bulleted and numbered lists to align the text paragraphs of all lists in the Help file.
- ⁂ Follow the *Microsoft Publications Style Guide* for formatting numbered lists:

To create a numbered list

1. Use an infinitive phrase for the procedure subheading.
2. Make the subheading bold but do not use a colon.
3. Type the step number, press TAB, and then type the text for the step.
Don't use a period after the number.
4. Repeat steps 1—3 for the other steps.

- Capitalize the first word of each bulleted list item.
- Use a period after each bulleted list entry if it completes an introductory phrase, but not after brief or one-word entries.

Strategies

- If you want to include parenthetical information that supplements a procedure, use pop-up windows.

Color

Color has the following qualities that you need to consider when planning your Help system: color attracts the eye, adding emphasis; items that are the same color appear to be related, while items that are different colors appear to belong to separate groups; and colors have different associations for different people and cultures. In addition, much less detail and subtlety of color is available online than in print, and poor use of color may even cause user eyestrain.

Principles

- Add color to your Help files only with extreme care. Overuse of color actually makes information more difficult to process, because the user slows down to think about what the different color means. Avoid adding color to text, in particular, as it is difficult to read, and it's meaning may be easily confused with Help's green hot spot text.

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- If you absolutely must add color, use it to convey information about structure, such as grouping or hierarchy, rather than to imply a

particular meaning, or as decoration.

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- ⁂ Always be consistent with the use of color. For example, since green is the default hot spot color, avoid using it for anything other than jumps or hot spots.
- ⁂ Do not depend on color coding alone. The user's monitor may not have color or may not correctly display colors. Some users may be color-disabled.
- ⁂ Design for VGA colors as a best-case scenario. Avoid the brighter colors of the Windows 16-color palette because bright colors can cause after-images, complementary (opposite) colors appear to vibrate, and both can cause eyestrain.
- ⁂ Don't rely on color to convey a particular meaning. Red, for example, implies "warning" in one culture, and "happiness" in another. Consult your localizer about color choices.

Strategies

- ⁂ If you must add colors to your Help file, add as few as possible. Remember that there are already five colors in the Help interface, (black, white, light gray, dark gray, and blue) and green hot spots. Too many colors distract the eye. Consider designing illustrative or navigational graphics with a limited palette.
- ⁂ If you must use colored text, use strong contrast. Do not put light text on a light background or bright text, like bright-green, on a bright background, like magenta.
- ⁂ It's helpful to use colored text for the hidden text coding in the source files. It stands out and makes it easier to debug and localize the topic files.
- ⁂ Help does not do any special color mapping for monochrome. It lets Windows do it.

Context Sensitivity

Context-sensitive Help provides the user with specific Help on actions and parts of the screen. Areas for which you can provide context-sensitive Help include menu commands, dialog boxes, error messages, language elements, command-line commands, fields, functions, screen regions, and tools.

The user receives context-sensitive Help by pressing F1 in an open menu or dialog box, or by choosing the Help button in an error message or dialog box. The user can also request it by pressing SHIFT+F1 or clicking the Help toolbar button and selecting a screen element, field, or menu item.

Pressing F1 or SHIFT+F1 provides the same context-sensitive Help but suggests different user motivation. By pressing F1, the user is asking for Help on the current context. By pressing SHIFT+F1, the user is choosing the context-sensitive mode in anticipation of requesting Help on a particular command or item.

Principles

- Provide specific, context-sensitive Help for menu commands, dialog boxes, fields, parts of the screen, tools, language elements, functions, and statements.
- Help on error messages should be context sensitive.
- If you choose to write Help topics for error messages, write a unique topic for each error message. Work with developers to eliminate redundant messages.
- Write a unique Help topic for each tool. Avoid long tables listing tools and their descriptions.

Strategies

- Negotiate with development and program management for greater depth of context sensitivity.

Developers assign context identification numbers to parts of the product, so they determine how much of the product can be context sensitive. They are also responsible for the functionality of the Help tool and the placement of Help buttons in error messages and dialog boxes.

- Include a Help tool on the default toolbar for products that use

toolbars.

- Include a Help button in error messages and dialog boxes as a visual reminder that context-sensitive Help is available.
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Cross-References

Cross-references are jumps within Help, references to print-based documentation, or references to the online tutorial.

Principles

- Place cross-references at the end of a topic under the subheading “See Also.” This subheading replaces “Related Topics.” It may be either plain text or bold.

When you make your decision about whether or not the See Also subheadings are bold in your Help file, consider whether the See Also information should be on the same level as other subheadings in the topic, or whether it is subordinate information. (One exception to placing cross-references at the end of a topic is making them accessible from the nonscrolling region if the cross-references are used for more of a navigational tool than for related information.)

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Cross-references are placed at the end of a topic so that the user can finish reading the topic before deciding which information to consider next. Avoid confusion by using the same wording for jump hot spots as the topics they refer to.

- It is not necessary to indent cross-reference lists without subheadings since they are introduced by “See Also.”

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- Do not use a colon after the “See Also” subheading if it is bold.
- Align the “See Also” subheading, subsequent cross-reference subheadings (for example, “Tutorial” or “User’s Guide”), and text flush left. Capitalize initial letters.
- If the cross-reference subheading and cross-references that appear

below it are the same font, the latter may be indented to help differentiate it from the subheading.

Some topics contain information that is relevant to several pieces of documentation. In these situations, use subheadings to group the different cross-references, preceding them with the standard “See Also” subheading. Align the cross-reference subheadings with the “See Also” subheading. To help differentiate the cross-reference text from the subheadings, indent the text, as in Figure 4.3.

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- If you display cross-references in pop-up windows, either format the “See Also” subheading as a normal jump (green, underlined, with no bold) or place a hot bitmap to the left of the subheading.

There are two ways to indicate that cross-references are contained in a pop-up window. You can format the words “See Also” as a normal jump hot spot, without bold formatting, or you can create a “cross-reference” bitmap and place it next to the “See Also” subheading, as in Figure 4.x.

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The user clicks the bitmap to see the cross-references (Figure 4.x).

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Strategies

- Page numbers in cross-references can be difficult to track and update. Unless you have a system for tracking and updating page numbers, avoid putting them in cross-references.
- By adding cross-references in pop-up windows instead of the main topic, you further subordinate the cross-reference information and set it apart. The advantage is that you can create links to a topic without overburdening the visual presentation of the main topic. The disadvantage is that the user has to display the pop-up window to see the available cross-references.

Examples

Examples within topics are presented in various ways, depending on their number and type. ⁴⁻¹¹

Principles

- Include short examples (one line or less) within the topic text where they best fit, without a subheading. You can introduce them with “for example” or “for instance.”

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- List several examples within a topic below the subheading “Examples.” Align the subheading and examples flush left. Format them as either plain text or bold, depending on the amount of emphasis you want subheadings to have (Figure 4.x).

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- Place subordinate examples (text or graphics) in pop-up windows.

Do not include important examples in pop-up windows since this hides the information from the user and, and it cannot be copied.

GRAPHIC

- Place in a separate topic, examples that are too long to include within the topic or in a pop-up window. Use this solution for extreme cases only, because it creates added navigational difficulty.

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Strategies

- Examples work well in secondary windows when you want to display the information along with the main Help window.
- Pop-up windows work well for examples that provide nonessential information.

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Fonts

Fonts provide a unifying feature to Help files without sacrificing creativity and without interfering with the particular needs of individual products and users. Fonts affect readability and eye fatigue, and provide visual cues to the organization of information.

Principles

- ▮ Use the Normal style, 10-point plain MS Sans Serif, for body text in Help topics.

This is the most readable screen font available. If you are shipping a product that will be run on Windows version 3.0, use 10-point Helv. Do not use Helvetica.

If a bitmap is included within a paragraph, change the line spacing to Auto to avoid text overlap.

- ▮ Avoid mixing two font sizes in body text.

You can use 8-point text sparingly, for example, in callouts to graphics, in labels, or as bold headings for nested tables.

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Shortcut keys and keycaps are an exception, as recommended in the *Microsoft Publications Style Guide*. Use 8-point CAPS to format shortcut keys (Figure 4.x).

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(Do not use the small kaps formatting attribute because the text may not wrap correctly.)

- ▮ Use a single font style for body text. It increases readability and visual flow.
- ▮ If you plan to use color for text other than jumps, use it sparingly and for a specific purpose. Make sure that the colored items are the most important items on the screen.
- ▮ Avoid the use of italic except for variable arguments because it is difficult to read. (Italic for variable arguments is consistent with the industry standard.)

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- ⁂ Use plain text with initial caps for book titles.
 - ⁂ Use bold for topic titles, subheadings, and literals (such as programming statements or text you want the user to type). If you want subheadings to stand out, use bold. If you don't want them to stand out, use plain text.
 - ⁂ Use Letter Gothic, Courier, or System font for syntax statements.

GRAPHIC

- ⁂ Avoid using TrueType® fonts. Not all users have True Type fonts installed.

Strategies

- ⁂ If you do use TrueType fonts, consider what you are trying to accomplish, and the fonts' accessibility to the user. Either ship the fonts with your product or make sure that users will have them.
- ⁂ MS Sans Serif is strictly a screen font, so it doesn't appear in the Font list box in Word for Windows. To format text as MS Sans Serif, either apply the appropriate style from the authoring template style sheet or type the font name in the Font box.

Graphics

Graphics include line art, icons, screen shots of the interface, and pictures with hot spots (hypergraphics). Use graphic images to illustrate concepts and present information visually.

Because of the complex localization process, work closely with your international team to determine the best localization strategies for the graphics in your product.

Principles

- ⁂ If you use a graphic next to a hot spot (in lists of jumps, for example), make both the graphic and the text hot.

Users tend to click anything that looks like a picture, whether or not you intend it to be hot. Including graphic elements with text hot spots provides users some flexibility, or "forgiveness," when choosing the hot

spot.

Graphic

- Since information in the Help window is anchored on the left, position bitmaps flush with the left margin, not centered, when they appear alone in a paragraph.

Graphic

- If you include graphics within text paragraphs, carefully consider the size of the graphics because they may interfere with the leading.

As a rule of thumb, graphics smaller or slightly larger than the cap-height will not cause layout problems; graphics larger than the cap-height will throw off the paragraph leading.

Graphic

- When providing Help on an application's terminology, include graphics of the interface elements along with the definition.

A great deal of users' difficulty in learning new applications is their unfamiliarity with terminology. Many of these terms also have visual equivalents, scroll bars, tool bars, pointers, icons, and custom controls, for example. Showing a small graphic of the term being discussed can help users learn the names of visual elements they must know to use the application (Figure 4.x).

Graphic

- Avoid confusion between the Help graphic and the application interface when presenting screen shots of the interface.

The danger in using screen shots in Help is that they are easily confused with the "real thing." One way to avoid confusion is to reduce scale, as in Figure 4.x:

Graphic

You can often achieve more emphatic results by presenting a partial screen shot. This method also allows you to focus on just that part of the interface you are illustrating (Figure 4.x).

Graphic

Or you can frame the screen shot with a colored background to avoid confusion (Figure 4.x).

Graphic

Another method is to make the graphics you use for screen shots appear more schematic-like, making them monochrome and simplifying the details, as in Figure 4.x.

Graphic

- For visual presentation and readability, add white space to the left and right of a bitmap in text, or above and below a bitmap in its own paragraph (Figure 4.x).

Graphic

- Consider carefully how graphics are combined with text in individual topics.

Depending on the color, size, and number of graphics in a topic, they can easily dominate the text and draw the user's eye to them. If the graphics function as subordinate elements in the topic, their dominance will make the information less readable.

Graphic

- Use separate graphics for the active and inactive states of custom controls (buttons, for example) that you add to Help topics.

In Windows, menu commands and dialog box options that are unavailable appear dimmed (grey instead of black), so users learn to rely on the application to control availability for them. Providing similar behavior in your Help file will make your controls more consistent with normal Windows behavior.

Graphic

- Because of the complex localization process, avoid combining both text and graphics on icons and buttons.

If you include text callouts or explanatory text in graphics, the entire graphic must be recreated in each language to localize the product. Text that is separate from the graphic can be translated without recreating the graphic. For example, in some cases you can create a table and place the graphic in one column and the text in another column (Figure 4.x).

Graphic

Strategies

- ▮ ~~Develop a consistent strategy for using graphics that will enhance rather than detract from information.~~

Don't burden users with unnecessary, decorative graphics. If the function of a graphic is to embellish the topic (make it interesting, beautiful, or colorful, for example), it may detract from the information presented in the topic and result in less effective communication.

- ▮ Be consistent with the visual grammar you create for your Help file by reinforcing the distinction between "hot" graphics and illustrative graphics.

If a certain graphic is hot in one topic, it should be hot in other topics where it occurs. This is especially important when using icons because users match the visual appearance with certain behavior. Changing the function of a graphic without changing its appearance will be confusing. If you do not want the graphic to be hot in all cases, create two distinctly different versions of it.

One way of making the differentiation clear is to use interface conventions for hot graphics, such as three-dimensional buttons (Figure 4.x).

Graphic

Or, you can use white space to separate the graphic from surrounding text and provide a well-positioned instructional phrase that tells users that the graphic is "hot" or "not hot."

Graphic

Another method is to create graphics with text callouts that are formatted the same as hot spots in the Help interface:

Graphic

If the graphics are purely conceptual art, they can be created in a different style from other graphics:

Graphic

- ▮ To facilitate the localization process, contact your international team to obtain the localized text that needs to be inserted in each bitmap and create these bitmaps according to the size of this localized text.

Headings

Headings should convey as much information as possible about a topic and help users locate information quickly.

Principles

- Align top-level topic headings flush left. Use 12-point bold type and initial capital letters. We recommend using the MS Sans Serif font. Use the “Heading 1, template style.”
- Align procedure subheadings flush left and use 10-point bold type. Use an infinitive phrase for procedure subheadings.

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Or use a dingbat (§) to indicate a procedure subheading and do not use bold type.

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- Decide on plain text or bold for subheadings (depending on how much bold is used in the Help topics) and apply your decision consistently throughout the Help file. You may want to use different styles for different types of subheadings.
- Do not use a colon after bold headings or subheadings.
- Avoid using color in headings and subheadings, especially when the heading is bold. Colored headings can overpower the visual presentation of the Help file.
- Capitalize the first word of procedure headings.
- Topic titles should have white space around them. Heading styles in the authoring templates automatically add white space. If you must define additional heading styles, use the heading styles in the template as a guide to maintain the appropriate amount of white space.

Strategies

- Multiple visual cues for headings, such as bold, color, and indentation, can confuse users. Consider using only one visual cue to

identify headings. For monochrome support, remember that you cannot rely on color as a visual cue.

- Icons or bitmaps in headings should complement the text. Consider the user's response to color and size when designing icons.

Jumps

In Help, text or a bitmap in a topic can link to a topic in another window, display information in a pop-up window, or execute various actions through macros. It is important that users experience consistent functionality when they choose a jump, pop-up, or macro hot spot.

Principles

- Use 10-point MS Sans Serif for hot-spot text.
- Assign the J1 authoring template style to a list of hot-spot text to add points of leading between the lines and to wrap the hot spot text correctly when the Help window is resized.
- When creating lists of hot spots, align them with the preceding text (Figure 4.x).

Graphic

- If you use color, a graphic, or some other visual indicator for a jump hot spot, don't use this visual marker for another purpose in the Help file.
- In running text, don't use jumps that replace the topic in the main window with another topic. Users can become disoriented when the main topic window changes before they have read all the text in the first topic.

If you must use jumps in running text, use a secondary window so that the original topic remains visible.

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- Don't use a pop-up hot spot within a pop-up window.

This replaces the content of the first pop-up window and may cause user disorientation. A pop-up window should be used when you want to give

additional information while retaining the content of the original message.

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- When a graphic and text are used to indicate a jump or pop-up hot spot, make both hot (Figure 4.x).

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- Users generally recall no more than five to nine chunks of information with any success. Don't put excessive demands on the user by having too many options to explore.

GRAPHIC

- When needed, use text by the hot spot to clarify for the user what will happen when they choose the hot spot.

Strategies

- Consider the overall design of all your Help files when determining how hot spots will appear and act. Provide the user with a consistent look and feel. For example, don't mix jump and pop-up hot spots, or green hot spots and graphical hot spots, in the same list or use the same visual marker for hot spots that result in different actions.

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- Limit the number of hot spots in a navigational screen or list, such as Contents, Index, and See Also/Related Topics. If many hot spots are needed in this type of list, consider grouping the hot-spot topics under headings. The headings should not begin with gerunds or jump to a new topic. They should display subheadings for the hot spots (Figure 4.x).

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- Include as few jump and pop-up hot spots as possible while still providing the needed information.
- When there are more than six headings in a navigational screen (such as Contents or an Index) or more than six subheading hot spots under a main heading, use a graphic and black text to indicate the hot spots. This helps prevent the "green screen" phenomenon (Figure 4.x).

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Microsoft Windows Help Authoring Guide If colors other than the default green are used for hot spots, users must edit their WIN.INI file to change the hot-spot color. Consider including a procedure in the How To Use Help file to help them change the hot-spot color.

- Punctuation that follows hot text must also be formatted as hot to prevent wrapping problems.

Nonscrolling Region

In Help 3.1, you can set aside part of a topic as a nonscrolling region, which is a fixed area at the top of a window with a scrolling region below it. The nonscrolling region lets users keep in view information that has an important bearing on the main topic. You can include nonscrolling regions in both the main Help window and in secondary windows.

Principles

- Use color in the nonscrolling region only if the color supports a distinction between the information in the nonscrolling region and the rest of the topic.
- Be consistent when using nonscrolling regions in topics. Don't use the nonscrolling region for one topic but not for a topic at the same level.
- Limit the nonscrolling region to less than one-half the height of a standard Help window. Less than one-third is even better.
- Avoid using nonwrapping text in the nonscrolling region.

A Help window does not display a horizontal scroll bar for the nonscrolling region. A user must enlarge the Help window if the nonwrapping text does not fit. There are certain exceptions to this principle—for example, when meaning is affected by wrapping text. Syntax lines often fall into this category.

Strategies

- Try using the nonscrolling region to display topic titles if the topic is

lengthy. That way users don't have to remember what topic they are reading when scrolling.

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- Keep one kind of information anchored at the beginning of the topic in the nonscrolling region. For example, you can display syntax statements in the nonscrolling region so that users can refer to them when reading parameter descriptions (Figure 4.x).

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- The nonscrolling region is convenient for displaying custom controls (navigational buttons, CBT launch buttons, macros executed by buttons) that change with the content of each topic. Because the nonscrolling region is part of each topic, the controls you place in it can be specific to the information in the current topic.

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- Try creating a graphic of the alphabet in the nonscrolling region for navigation through an index. Each letter can serve as a jump to a point within the scrolling region. In some cases, you will have no topics that fall under a letter. You can handle this situation in two ways: (1) gray out all letters not active but keep integrity of the alphabet, or (2) create a range of letters, for instance, A through F. Your material should determine your choice. But avoid mixing these two approaches in a graphic.

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- The nonscrolling region can contain entire topics, especially if you want to use all the available window space without having scroll bars cover up part of the information. For example, you can create a topic that just displays a graphic in the nonscrolling region so that the window is the same size as the graphic (Figure 4.x).

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- Put a Close button in the nonscrolling region of a secondary window. This reminds users that they must dismiss the window. A Close button in the nonscrolling region is always visible and accessible (Figure 4.x).

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Notes, Comments, Hints, and Tips

Notes, comments, hints, and tips present information subordinate to the rest of the information in the topic. They are formatted for less visual emphasis within the topic. Whether you use a note, comment, hint, or tip depends on the type of information given.

Notes contain neutral or positive information that emphasizes or supplements important points. Notes can apply to a single paragraph or a whole topic. Comments contain supplemental information. Hints and Tips suggest alternative methods that may not be obvious, and Help users understand the benefits and capabilities of the product. Hints and Tips are not essential to the basic understanding of the text.

Principles

- ▮ Place the note, comment, hint, or tip in its own paragraph following the information it pertains to. Format the note, comment, hint, or tip appropriate to the context—numbered list, table, body text, and so on (Figure 4.x).

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- ▮ Avoid using color and bold together for the subheading.
- ▮ When using plain text for the subheading, add a colon with one space after it.

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- ▮ When using bold, do not add a colon (Tip).

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- ▮ Do not add a “Comment” subheading to comments.

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Strategies

- ▮ Use notes, comments, hints, and tips sparingly so that they retain

their effectiveness.

4-23

Pop-up Windows

Pop-up windows are nonmoveable, nonsizable windows that remain on the screen until the user dismisses them. Pop-up windows typically contain definitions of terms or other parenthetical information. Good uses for pop-up windows include illustrations, examples, notes, tips, and lists of keyboard shortcuts.

Principles

- ▮ Don't put pop-up hot spots within pop-up windows.

Help dismisses the existing pop-up window to display the new pop-up window. This can disorient the user.

- ▮ When using a pop-up window to define a user interface item, you should include a graphic, if possible, that shows the item being defined.

Strategies

- ▮ Remember when deciding to use a pop-up window that the user cannot print the information in pop-up windows, that pop-up window titles don't appear in the history list, and that the user cannot return to a pop-up window using the Back button.
- ▮ Avoid placing too much text in a pop-up window since not all of it may fit (Figure 4.x).

GRAPHIC

Secondary Windows

A secondary window is an independent Help window that has a title bar and scroll bars but no menu bar. Secondary windows are resizable and moveable, and they remain open until closed by the user, whether or not the main Help window is open.

Principles

- ▮ Use the same formatting guidelines that apply to the main Help

window. This includes use of nonscrolling regions and graphics.

When deciding on a size for a secondary window, consider the amount of information that will appear in the window. Avoid forcing the reader to scroll horizontally.

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- If you define more than one type of secondary window, make sure each type appears in a consistent location and in a consistent size unless the purpose of the window requires special placement or sizing.

When varying size, it is better to vary the height of secondary windows than their width. Having secondary windows appear in too many locations or in too many sizes can create an unnecessary distraction for the user.

The following example demonstrates how inconsistent sizing and placement of secondary windows are distracting (Figure 4.x).

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- Don't define secondary windows to appear always on top since the user cannot override this author-defined setting.

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- Be consistent when using jumps from secondary windows. If not handled carefully, jumps from secondary windows can disorient the user, contributing to the "lost in hyperspace" syndrome.

Remember that secondary windows do not have a button bar—if you jump from one topic to another in a secondary window, consider adding a Back button (or a link to the previous topic) in the window.

- Use secondary windows to display information from jumps in running text. This retains the original context in the main Help window while giving the user access to the additional information in the secondary window.

Strategies

- Secondary windows don't automatically close when you close the main Help window. It's a good idea to add a **CloseWindow** macro

(tied to a hot spot) to give users an easy way to close the secondary window. You can use a hypergraphic to simulate a Close button in a secondary window (Figure 4.x).

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- Good uses for secondary windows are glossaries, procedures, examples, sample code, indexes, alphabetic lists, or other information the user may want to have available with or without the main Help window.

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- Secondary windows do not have the ability to print or copy their contents to the Clipboard. You may want to add macros that perform these tasks, especially if you are using the secondary window for sample code or examples. You can add these macros by simulating buttons with graphics or with jump hot spots (Figure 4.x).

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Shortcuts and Shortcut Keys

Shortcut keys and shortcuts are alternate methods for completing an action. A shortcut key consists of a letter, symbol, or function key, often pressed in combination with the CTRL, SHIFT, or ALT key. Shortcuts can be tools, buttons, or shortcut menus.

Principles

- Use 8-point uppercase for key names, but make the plus sign (+) 10 point (if there is one) so that it is readable online.
- Follow the *Microsoft Publications Style Guide* for formatting key combinations. Do not put a space between the plus sign and the key names. For example, CTRL+K. Do put a space between commas in a key sequence in which the user presses keys in sequence. For example, ALT, T, P.
- Use 10-point MS Sans Serif (the style that you are using for the list) for describing the shortcuts.

- Shortcuts that are tools or buttons should have the icon to the left of the name of the tool or button and should not be formatted as a jump (Figure 4.x).

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- Do not format a list or table of shortcuts as jump hot spots. Instead, repeat them as jump hot spots in the “See Also” section.

Strategies

- Shortcut keys/shortcuts can be presented in a variety of ways:

- In a paragraph within text

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- As a list in text

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- As a table

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- In a pop-up window

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Tables

In Help 3.1, you can create simple tables (tables without borders or shadows) using the Word for Windows table formatting features. Table design varies depending on content. The following sections discuss design principles and authoring strategies for working with tables.

Note

Windows Help 3.0 does not support true tables. To create a table, you must use hanging indents or side-by-side paragraph formatting.

Principles

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n Tables are difficult to read online, so don't overuse them.

n You can use bold or plain text for your table heads.

Use bold for table heads when the table contains commands or options that the user must choose. The bold text directs the user's eye to the options. Use 10-point bold (style Th).

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Use 8-point bold (style Th3) when the topic already contains a 10-point bold heading.

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Use a plain head with a rule for tables that contain lists of information (style Th2).

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n You do not need to use a rule beneath the table heading.

If you do use a rule, define either a broken or solid, single-line rule.

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If you don't use a rule, your heading must be bold and you must add 3 points of white space after the table heading.

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n Use plain text for table text, and capitalize the first word in each column.

n Do not use a rule above the table heading.

n Align tables left with text that appears directly above the table.
Tables with numbered or procedural lists should also be left aligned.
Table heads should be aligned with table columns.

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n In a table created using a hanging indent, avoid column headings that are much longer than the text within that column. If possible, the column heading should not be wider than the widest item in the column.

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- The gutters between table columns should be narrow, based on the way the table is being used.

Too small a gutter makes the text crowded and illegible; too large a gutter makes the table difficult to read horizontally. For example, a table designed to be read from left to right should have 1 to 2 picas of space between columns.

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A table whose information is grouped to be read vertically may need more space.

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A table used to position text and graphics precisely may need more space between columns.

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- If possible, avoid nested tables (a table within a table). If necessary, follow the same guidelines as regular tables.

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- If a topic has more than one table, format all the tables with the same column widths.

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- Divide long tables into two or more smaller tables, whenever possible.

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Strategies

- Tables provide a way to lay out text in more precise positions, for example, they are a good way to create a gutter between bitmaps and text.
- A table is designed to be read from left to right. The exception to this might be a table with graphics (such as icons or other bitmaps), where the user would scan a table vertically (read down or up). In this case, the graphics would still be placed in the left column.
- If you are creating a two-column list, you can use either the table

feature in Word for Windows or hanging indents. However, for lists with three columns or more, use the table feature.

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- Be aware of “crowdedness” in table text versus table columns. Localized versions of Help tend to increase by 30 percent or more.
- Relative tables should not be used if the precise layout of your information within the table is critical. For example, if syntax statements should not wrap, do not use a relative table.

White Space: Margins, Indents, and Leading

When laying out visual elements, the more white space you place around an element, the more importance it has visually. Adding more white space between elements separates them in a visual organization. Less white space between elements groups them together.

Indents are less effective in online than in print documentation, and so are used less frequently. (When we refer to indents here, we mean variations from the left margin in the built Help file, not the paragraph formatting devices called “Indentation” that we use to create left margins, two-column lists, and text wrapping in numbered and bulleted lists.)

Note

An 8-pixel left margin is built into the Help application. We recommend that Help authors add an additional 0.8 inches. (This 0.8" has been added to the styles in the Help Authoring Templates.)

Principles

- Use ample top and left margins to improve legibility in Help topics by separating Help from other images on the screen.

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- Use a consistent left margin. It enhances the general legibility that is so important for online presentation and unifies a body of information.

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Microsoft Windows Help Authoring Guide Avoid using indents online (except the indent necessary to wrap text in numbered and bulleted lists).

Indenting works best when you can see a whole page (as in printed books). It visually structures the hierarchy of information. Online, indenting loses its context, especially in a small Help window. In addition, indents can give the impression that the left margin is constantly changing when you scroll through a long topic or jump to another topic.

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If it's absolutely necessary to use an additional indent, align it with the left margin of text in a numbered or bulleted list. Do not use more than two indents.

- ⁂ Use minimal white space between items you want to group. Use more white space between items you want separate.

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Strategies

- ⁂ Overcrowding Help topics compromises their legibility. Before reducing margins or removing white space to fit more text into a topic, consider reorganizing the information into smaller chunks or accepting more scrolling.
- ⁂ Use solutions such as space between paragraphs for organizing topics visually and pop-up windows for subordinating information to compensate for the loss of indents as a layout option.
- ⁂ If plain text follows a nonscrolling region, consider adding 6 points above the text to separate it visually from the nonscrolling region visually.