

Getting a Fresh Perspective on Your Help System Checklist

Review business objectives

- What is the main purpose for this help system?
- What should it accomplish?
- Where is it on target?
- Where is it lacking?
- Have the goals changed since the last version?
- If so, how?

Review user needs

- Who are the users?
- What are their goals?
- When do they turn to the help?
- What do they need it to provide?
- Does it provide what they need?

User	Does help meet their needs?	What's missing?	What do they want/need most?
Novice			
Expert			
Occasional			
Internal (Ex: customer support)			
And so forth...			

Check entry points

Help menu and Help "home page"

- Is there information of value on the "home page"?
- Which users does it address?
- Could it be improved, or assist more users?

Context-sensitive access

- Can the user see how to launch it?
- Is it consistently available?
- What information appears? (Task? Reference? Conceptual? List of topics?)
- Is it the type users want/need most?
- For which users is this the case?
- Is additional information readily available, and apparent?

Index

- What information is indexed?
- Is the index comprehensive?
- Are the terms indexed based on how the user thinks, or what is in the interface?
- What do users want to look up?
- Where do index entries take the user? Upon "arrival," do they see what they are looking for?

Table of Contents

- Is it used? By which users?
- Does the organization make sense to users?
- Which users did you have in mind when you created it?
- How could it meet the needs of other users?

List topics ("sub-contents")

- Do you use list topics to provide access to related topics?
- What categories of topics would be of use?
- Would particular users benefit from topics identified for their use?
- If you were to create a Yahoo-like view of your help system, would it look like?

Review Inter-topic navigation

- When users land at a topic, can they assess:
 - Am I in the right place?
 - If not, where should I go?
 - What additional information do I need?
- What types of inter-topic navigation are used?
 - See-also lists
 - Related topic buttons
 - In-line links
 - Link bar or menu
- Are methods for linking to other topics used consistently?
- Do they help users find their way to the information they need?
- Do you have links to types of information (link bar or menu)?
 - Would this approach be helpful?
 - Is your information chunked consistently, to allow this?
 - Are there types of topics that consistently relate to each other, such as tasks, examples, concepts, reference?

Check level of granularity

At the topic level

- Is amount of detail appropriate?
 - Not too brief
 - Not too detailed
- Does the level of “chunking” work?

At the help system level

- Is the depth of information appropriate?
- Does it address what users need and want to know?
- Have types of information been identified?
- Is information covered in the same depth across the content? (For example, tasks, reference, examples, concepts, and so forth.)

Check for context clues

- What assumptions are inherent in topics?
- Does a topic assume a reader arrived at it in a particular way? (via index, contents, context-sensitivity, etc.)
- What if the user arrives at it in some different way?
 - Does it make sense?
 - Will they be missing any information?
- Does a topic assume a user already knows how to do certain things?
 - What if they don't?
 - Are links provided to prerequisite topics?
 - Are assumptions spelled out? (Before doing X, you should already know Y.)

Assess readability and scannability

- Check for flexibility in design
 - Were topics written with a particular screen resolution and window size in mind?
 - What happens at different resolutions?
 - What if the window is resized?
 - What if the window is maximized?
 - What if the display is set to Large Fonts?
- Can the user resize fonts?
 - Does text reflow smoothly and display clearly?
 - Have you used relative font size and spacing?
- Is color used to convey meaning?
 - What if a user is color blind? Will the meaning be lost?

- Are headings clearly distinct from text?
- Can the user easily scan headings to identify what information is included?
- Are bulleted lists used to emphasize key points?
- Are instructions clearly distinct from surrounding text?

Consider accessibility issues

- How will your topics sound through a screen reader?
- Is Alt text used for images?
- When images are used to illustrate concepts, are textual descriptions also provided?
- Do tables have titles?
- Are row and column headings used?
- Can users tell when a link will open another window or display in a pop-up?
- What if JavaScript is turned off? What will be lost?
- Can a user navigate your help from the keyboard, without a mouse?

Browser issues

- For browser-based help
 - Will users always have a particular browser?
 - Are you setting a browser requirement?
 - Have you viewed the help in all supported browsers?
 - Have you viewed it on a Mac?
 - Have you viewed it on Linux?