

# **From Hard Copy to Hypertext**

**Transforming User Manuals into Online Help**

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You've met with the product developers. Tinkered with the prototype. Written drafts of the product manuals and had them reviewed and edited. The manuals are just about done.

And then comes the online help.

Many writers use the text in the paper manual as the basis for the online help; this process certainly has benefits. You've already written the procedures that need to be included in the help topics, and the similarities between the presentation in the online help and the manuals will provide some level of comfort to the users.

But simply importing the text from hard copy into an online help program isn't enough to create effective online help. This white paper explains how to transform your paper-based documents into effective hypertext by modifying their organization and content.

## Paring down content

When converting hardcopy documents into online help, you usually exclude quite a bit of information. Installation information may be crucial for a manual, but it's not necessary or appropriate in online help. (After all, the users can't access the online help until *after* they install the software.) You can remove other procedures from the help files—what to do when the power goes off, for example. The help should contain only those procedures that the user needs while actually using the application. Most disaster-recovery and installation procedures are not appropriate for online help. Those instructions should appear in your paper documentation.<sup>1</sup>

Eliminating lengthy examples and conceptual descriptions is also a good idea. Most users look in the online help for quick fixes, not for detailed explanations. In the help file, explain that the online help file covers common tasks and that users should refer to the printed documents for conceptual information.

When converting a manual into online help, you can leave out procedures such as installation instructions.

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1. At a minimum, access to these instructions should not depend on the software. You could, for example, provide an Adobe Acrobat (PDF) file that contains these instructions. Users could access this file directly from your installation disks or CD.

## Using hypertext linking

One of the obvious advantages of online help over a paper manual is hyperlinking. The ability to jump quickly from topic to topic is unique to online materials.

But hypertext linking introduces some problems, too. You can assume that users reading your book have basic knowledge about how a book works; for example, they already know how to use the table of contents and the index, and they understand page numbering. This is not necessarily true with hypertext navigation; many users are not comfortable navigating through an online help file.

You need to be extremely careful about using hyperlinks—your usage should be very consistent. If you're consistent, the user will eventually develop a level of comfort with your navigation interface.

For example, you could provide a list of related topics at the bottom of some topics. Users will quickly learn to look at the bottom of the online help topic for related topics if the current topic is not exactly what they were looking for.

Another useful interface convention is to use secondary windows. If you are describing a procedure and need to explain a subordinate procedure, you could provide a link that displays the subordinate procedure in a secondary window. This allows the user to look at the subordinate procedure without losing the display of the primary procedure. For the user, this is easier to handle than having to click the Back button to return to the original procedure. If you choose to implement secondary windows, you need to use them consistently throughout your help system.

One of the primary problems with online help is the “lost in space” effect. Users often complain about getting lost in layers and layers of links. For this reason, we recommend that you map out your hypertext navigation. Try to avoid “click fatigue”; don't make your readers click through successive windows to narrow down their search. The Windows 95 Contents tab (see [page 5](#)), which lets you create a hierarchical table of contents, is very helpful in flattening out your hypertext structure.

Hypertext linking is probably the best feature of online help, but don't assume users are comfortable with it.

## Adjusting hardcopy cross-references

In manuals, it's good practice to include cross-references such as the following:

Before you can bake a cake, you must turn on the oven, as explained in "Turning on the Oven" on page 3.

When this sentence appears in online help, you can modify it to take advantage of hypertext capabilities. Instead of having the explicit cross-reference beginning with "as explained in," make the "turn on the oven" phrase into a link to the "Turning on the Oven" topic:

Before you can bake a cake, you must [turn on the oven](#).

The color of the text and the underlining alert the reader to the cross-reference.

Streamlining hardcopy cross-references in this manner eliminates quite a bit of text—and brevity certainly is a priority when creating online help.

Cross-references should be handled a bit differently in online help.

## Defining terms and acronyms

Many companies' style guidelines require writers to define acronyms on their first references in each chapter and to define terms on first occurrences in a manual. However, the idea of sequential chapters is not really relevant in the nonlinear world of online help, so you need to adjust definition usage accordingly.

You can use pop-up topics to define acronyms and terms; the first occurrence of an acronym or term in a *topic* should have an associated pop-up. Although creating pop-up definitions for each term in each topic is incredibly tedious, your users appreciate it because they don't have to search through browse sequences or use the Find tab to locate a definition.

In addition to the pop-ups throughout the text, we also recommend that you provide a glossary topic that lists terms and acronyms. Create a Glossary button on your help navigation bar to make it easy to find. The glossary lists all of the terms and acronyms that you have defined throughout the online help. This lets a user quickly find a definition.

Pop-ups within topics and a glossary topic make it easy for users to get definitions of terminology.

## Creating browse sequences

In help files, related topics are strung together in browse sequences. It's very tempting to create browse sequences that contain all the sections and subsections in a chapter. Unless your

manual is very short, this will create an unwieldy browse sequence that doesn't help your users. Consider eliminating subtopics from the browse sequence; this will shorten the browse sequence and make it more usable.

For example, suppose the topic "Eating Cake" contains links to two subtopics, "Eating Cake with a Fork" and "Eating Cake with Your Fingers." These subtopics are also included in the browse sequence immediately following the "Eating Cake" topic. Because these subtopics are linked from the main topic, you can remove them from the browse sequence, which now has two less topics the user must scroll through.

It's tempting to create browse sequences that are very long.

## Creating Contents and Index tabs

In hardcopy documents, tables of contents and indexes are essential tools for the readers to find what they're looking for. In online help, the Contents and Index tabs are even more critical because the reader cannot just "flip through" the online help.

### The Contents tab

The Contents tab is similar to a traditional table of contents in a book. But unlike a paper table of contents, you can collapse the entries in the Contents tab. This means that readers are unlikely to scan all the levels of the contents. Instead, they will probably look only at the top level of headings. As a result, you need to ensure that the higher levels of headings are meaningful. Otherwise, your readers may never expand the top level and find the topic they're looking for.

Eliminating redundancy in the Contents tab should also be a priority. For example, using the earlier example about eating cake, a Contents tab could contain the following entries:

Eating Cake

Eating Cake with a Fork

Eating Cake with Your Fingers

Cut back on the repetition of "eating cake" by reworking the entries:

Eating Cake

    Overview

    With a Fork

    With Your Fingers

Unlike the entries in a book's table of contents, the entries in a Contents tab do not have to precisely match the names of topics, as the revised entries in the example show. Using this abbreviated format shortens the amount of text in the tab as well.

Pare down the entries in the Contents tab. A lengthy list of topics may intimidate users.

## **The Index tab**

While creating the text of your manuals in document processing software, you probably created index entries when you generated the index file. The same principle applies to online help files. Generating an Index tab automatically includes the names of all topics as entries, but you should also insert markers into the topics to flag terms you want included in the index. Even though users can do full-text searches of topics, they shouldn't have to rely on that ability to find the information they need. A thorough Index tab can save users a lot of time when they are searching for specific information.

## **Successful transformation from hard copy to hypertext**

When transforming a manual into online help, considering the issues addressed in this white paper can provide multiple benefits. Your user gets concise online help that is easy to navigate, with wording similar to that in the hardcopy manuals. Your technical support staff will probably handle fewer calls for your product because users can quickly find the information they need online.

And best of all, you save yourself some time and money by using text you've already written.

## **Contacting us**

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