

Adding Demonstrations to Online Help

General Approach: When recording Show Me demos, you are emulating the over-the-shoulder method of instruction. A user walks across the hall to ask the expert how to do something. The expert says: "Let me show you." and proceeds to demonstrate the procedure, making comments along the way to point out best practices and pitfalls. The expert also explains when and why to perform the procedure. The user is an observer.

Steps	Explanation	Tips
1. Decide what you need to show	Create demonstrations to show: <ul style="list-style-type: none"> ▪ Complex procedures ▪ New features ▪ Procedures resulting in technical support ▪ Ways to work more efficiently 	<ul style="list-style-type: none"> ▪ Show only one procedure per demo ▪ Don't try to demonstrate all procedures ▪ Focus demos on intermediate users (advanced beginners and competent performers)
2. Limit the length and size of your demos	<ul style="list-style-type: none"> ▪ Keep procedure demos under 3 minutes long ▪ Users will lose interest and exit longer demos ▪ Guided Tour and Scenario-based demos may be longer ▪ Use the lowest screen resolution possible, typically 800x600 ▪ Capture a portion of a large screen if the entire screen is not necessary 	<ul style="list-style-type: none"> ▪ If a demo must be longer than 3 minutes, tell the users up front how long it will take to complete the demo and allow them to skip irrelevant content ▪ Eliminate unnecessary information from the capture such as browser controls ▪ Eliminate the high-level user interface (such as menus) if possible to reduce the need to revise all demos for small UI changes
3. Open the application to the starting point of the demo	<ul style="list-style-type: none"> ▪ Don't show unnecessary steps leading up to the procedure ▪ Make sure you have the source files and folders you need to complete the procedure without unnecessary browsing ▪ Make sure the desktop is clear with only one color 	<ul style="list-style-type: none"> ▪ Think about how you will "reset" the application and source files if you need to re-record the demonstration ▪ Make sure the data you use can be distributed to the general public
4. Walk the user through the procedure	<ul style="list-style-type: none"> ▪ Get the user's attention ▪ Tell what you're going to show ▪ Tell when/why the user would perform this procedure ▪ Show the best way to perform the procedure ▪ Provide advice ▪ Create transitions between unrelated areas/tasks 	<ul style="list-style-type: none"> ▪ Don't try to show all ways to perform a single procedure ▪ Try videotaping experts explaining the procedures to use as a model for the script ▪ Don't add interactivity, simulations, or quizzes to show me demos
5. Direct the user's attention	<ul style="list-style-type: none"> ▪ First, use the cursor to direct the user's eye to the area being discussed ▪ Second, highlight the area ▪ Third, display a caption to callout and explain the area 	<ul style="list-style-type: none"> ▪ If you have multiple areas to explain on one screen, capture additional screens so you can use the mouse to direct attention on each screen ▪ Try expressing one "thought" per screen

6. Give the user time to process new information	<ul style="list-style-type: none"> ▪ Use voiceover narration if possible to let the user look around the user interface without reading ▪ Provide pauses after new information 	<ul style="list-style-type: none"> ▪ Use longer display times for unfamiliar screens (this may be their first time to see what you're showing them) ▪ If you think the timing is just right, it's probably too fast (the user needs to explore, read, and think about what you said)
7. Orient the user	<ul style="list-style-type: none"> ▪ Provide an introductory slide that tells the user what you're going to show (great place to work in branding) ▪ Provide transition slides between different tasks or to span unexplained jumps in the UI 	<ul style="list-style-type: none"> ▪ Use a progress indicator if following a process you want to reinforce
8. Edit captions	<ul style="list-style-type: none"> ▪ Go beyond the simple steps of the procedure <ul style="list-style-type: none"> - Best practices - Define terms - Explains concepts briefly - Summarize and forecast - Common problems/misconceptions 	<ul style="list-style-type: none"> ▪ Be consistent how you refer to the users <ul style="list-style-type: none"> - "Click on the ____" - "First, you click on the ____" - "First, you would ____" - "First, we click on the ____" - "First, Bill clicks on the ____"
9. Use the demos everywhere possible	<ul style="list-style-type: none"> ▪ Insert demos into the help in the topic describing the procedure ▪ Create a topic that collects related demos and give it a high profile place in the TOC (maybe also the home page) ▪ Link to demos directly from the application ▪ Add demos to the knowledge base and/or website ▪ Reuse demos in online training 	<ul style="list-style-type: none"> ▪ Publicize the demos internally and externally ▪ Get trainers to use the demos in class ▪ Try to provide incentives to complete the demos such as scavenger hunts
10. Display the demos	<ul style="list-style-type: none"> ▪ Open a new browser window ▪ Turn off all browser controls ▪ Maximize window ▪ Allow users to pause, play, fast forward, rewind, and exit the demos 	<ul style="list-style-type: none"> ▪ Link to demos on a centralized server if possible with backup copies stored locally