

Providing Text or Pictures for Help Balloons

Use help balloons to provide the user with information that describes or explains elements of your application. The information you supply in help balloons should follow a few general guidelines in order to provide the most useful information to the user. This section describes these guidelines.

For examples of how your application should use help balloons, observe the help balloons provided by the Finder, the **TeachText** application, and system software.

Defining the Help Balloon Content

Use help balloons to explain parts of the interface of your application that might confuse a new user or elements that could help a user become an expert user. The information you provide in help balloons should identify interface elements in your application or describe how to use them. Each help balloon should answer at least one of these questions:

- **What is this?** For example, when the user moves the cursor to the item count in the upper-right corner of a Finder window, the Finder displays a help balloon that reads “This is the number of files or folders in this window.”
- **What does this do?** For example, when the user moves the cursor to the Find command in the Finder's **File** menu, the Finder displays a help balloon that reads “Finds and selects files and folders with the characteristics you specify.”
- **What happens when I click this?** For example, when the user moves the cursor to the close box of a window, the **Window Manager** displays a help balloon that first defines the element (“Close box”) and then explains “To close this window, click here.”

The content of help balloons should be short and easy to understand. You should not include lengthy instructions or numbered steps in help balloons. Use help balloons to clarify the meaning of objects in your application—for example, tool symbols in palettes.

Use simple, clear language in the information you provide. Include definitions in help balloons when appropriate.

You can use graphics or styled text in help balloons to illustrate the effects of a command. For example, to demonstrate the **Bold** command in a word-processing application, you might use styled text to show a word in boldface.

You can provide separate help balloons for each state of a menu item or dialog item. The help balloon that you provide for an enabled menu item should explain the effect of choosing the item. The help balloon that you provide for a dimmed menu item should explain why it is not currently available, or, if more appropriate, how to make it available.

Complicated dialog boxes can often benefit from help balloons that

explain what's essential about the dialog box. You can use help balloons to describe groups of controls rather than individual controls. For example, if a dialog box has several distinct regions that contain radio buttons or check boxes, you could provide a help balloon for each set of radio buttons, rather than providing a separate balloon for each button.

If you use a function to customize standard dialog boxes, use as many of the existing help balloons as possible. For example, if your application uses any of the standard file dialog boxes and provides an extra button, you can create a help balloon for the extra button, and the

Help Manager continues to use the default help balloons for other elements of the dialog box.

To make localization easier, you should store the content of your help balloons in resources separate from the help resources.

See **Worldwide Software Overview** and **User Interface Guidelines** for extensive information about developing software for a worldwide market.

Using Clear, Concise Phrases

You can provide up to 255 characters of information using text strings in help balloons. (You can use up to 32 KB if you use styled text.) However, you should include only the most relevant information in the help balloon. To determine what to provide, decide what information would be most useful to a user. This information does not usually give the object's name, which normally does not matter to the user, but instead tells what the object is for and what the object does. This information does matter to the user.

You might eventually translate your help content into other languages, so try to keep the information as short as possible. When translated, your help messages may require more words or longer words-and therefore larger balloons and more screen space. (Translated text is often 50 percent longer than the equivalent U.S. English text.) Also avoid language or phrasing that might be colloquial, offensive, or likely to lose its meaning when translated into another language.

If an item already has a commonly used name, or if it is a special case of a larger category of objects, name it in the balloon. The Finder, for example, displays the message "Drag the title bar to move the window," since title bars and windows are commonly used names. However, you do not need to name everything in your application just so that you can refer to it in a help balloon. The tip of the help balloon points to the subject of the help balloon. You can easily say "To apply the style, click here," rather than "The **Apply** button activates the **Styles** command. Click the button to activate the command."

For balloons that describe menu items, you can use sentence fragments. The subject can be omitted because it is obvious from the context. Using sentence fragments lets users assimilate the content of the balloon more quickly because they have fewer words to read. For example, the help balloon for the **Open** command could read "Opens the

selected file" rather than "This command opens the selected file."

Using Active Constructions

Try to use short, active phrases in help balloons. Avoid passive constructions. An active construction is more forceful because it communicates how a subject (usually the user in this context) performs an action. In the sentence "To turn the page, click here," the implied "you" (that is, the user) is the subject, and "click" is the action that the subject performs. Passive constructions show subjects being acted upon rather than performing the action. For example, both "page" and "button" are acted upon in their respective clauses in the sentence "The page will be turned when this button is clicked."

Research suggests that in instructional materials it is better to present the goal clause before the action clause to help readers quickly recognize how the information meets their needs. Users are then able to determine whether the content is relevant to what they want to do. A goal might be "To turn the page," "To calculate the result," or "To apply the style." For example, the message "To turn the page, click here" starts with a goal statement and then describes the action necessary to fulfill it; users find this more helpful than a purely descriptive message like "This button turns the page."

Using Parallel Structure

Use similar syntax for help balloons that describe similar objects. For example, all help balloons that describe buttons should have the same structure. In a style dialog box, you might provide these messages for the buttons: "To see the style, click **Apply**," "To implement the style, click **OK**," and "To do nothing to change the previous style, click **Cancel**."

Users see help balloons provided by many different applications, so a consistent approach within your application helps them to quickly identify types of balloons and to develop realistic expectations about their content.

Using Consistent Terminology

You should employ consistent terminology in all your help balloons. Use language that users understand. Avoid introducing technical jargon or computer terminology into help balloons. Follow the style and usage standardized by Apple, in the *Apple Publications Style Guide* (available through APDA) to make the most effective use of the information and vocabulary with which users are already familiar.

Defining the Help Balloon Position

When you provide a help balloon, you specify its content, the tip of the help balloon, and the variation code for its preferred position. The tip of the help balloon should point to the object the help balloon describes. You should specify the tip location and the variation code so that the help balloon does not obscure the object you're providing help for. In most cases, the tip of the help balloon should point to an edge of the object you're providing help for.

You should also consider how the **Help Manager** repositions the balloon if the variation code places it offscreen.

Help Balloon Display describes how the **Help Manager** repositions the help balloon if necessary.