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In-product content

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QUICK BASE

Agenda

- This presentation explains the approach for in-product content for Quick Base
- It defines the terms assistance and guidance, and how these terms map to patterns and components we may need to design (or redesign)
- It provides a basic progression of decision making on how to best use and improve in-product content

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Content progression

The progression is defined and organized into three areas, or steps:

- 1 | Basic content
- 2 | Assistance
- 3 | Guidance

The progression is supposed to help us decide how best to explain interactions, or help us realize that an interaction needs to be simplified

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Break in case of emergency

- Idea that we should use in-product content sparingly
- Work through the progression and definitions
- Don’t assume all interactions need all the content to be assuring for the user

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The first step: Basic content

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1 | Basic content

Basic content includes:

- Labels
- Instructional text
- Tool tips

When some form of basic content is clear, concise, and complete, further assistance or guidance may not be needed to help the user understand what to do.

1 | Basic content | Labels

Using clear, concise, and descriptive labels is the simplest and most essential way to help explain an action.

Labels should always be in sentence case and without ellipses, for example:

- ✓ Do: **Create a relationship**
- ✗ Don't: **Create A Relationship...**

While some labels need to organize information for the user, ideally labels should also describe or capture the action being taken, for example:

- ✓ Do: **Set columns to display**
- ✓ Okay (for organizing other items): **Report columns**

1 | Basic content | Instructional text

Instructional text provides a simple, direct way to explain essential information. This pattern puts content in-line with what the user is doing.

Instructional text can and should provide assurance to the user, that they are getting just enough information to make them feel good about the action being taken.

We should have two modes for instructional text: **static** and **toggle**

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1 | Basic content | Instructional text | static mode

Static mode

Static instructional text always appears for the user, typically accompanying a label.

If a task has information a user needs to reference while completing an action, such as password requirements, then static mode should be used.

We're already using static instructional text in Quick Base, but we don't always use it consistently.

Static mode examples

✓ Example 1

Create a report

See, organize, and work with the data in your table.

Color-coding rows

You can highlight data by color. Use a field or formula to add colors to rows in your table report.

Set columns to display

Choose fields from your table to appear as columns in your report.

✓ Example 2

List this report in the panel for:

Everyone

Everybody can see the report in the panel.

Users in my role

Users who have my role can see the report in the panel.

No one; hide it

The report doesn't appear in the panel until you say otherwise. To see the report, create a bookmark in your browser.

Only me

Only you can see the report in the panel. You can't ever list it for other users. You can still let others open it by sending them links.

1 | Basic content | Instructional text | toggle mode

Toggle mode

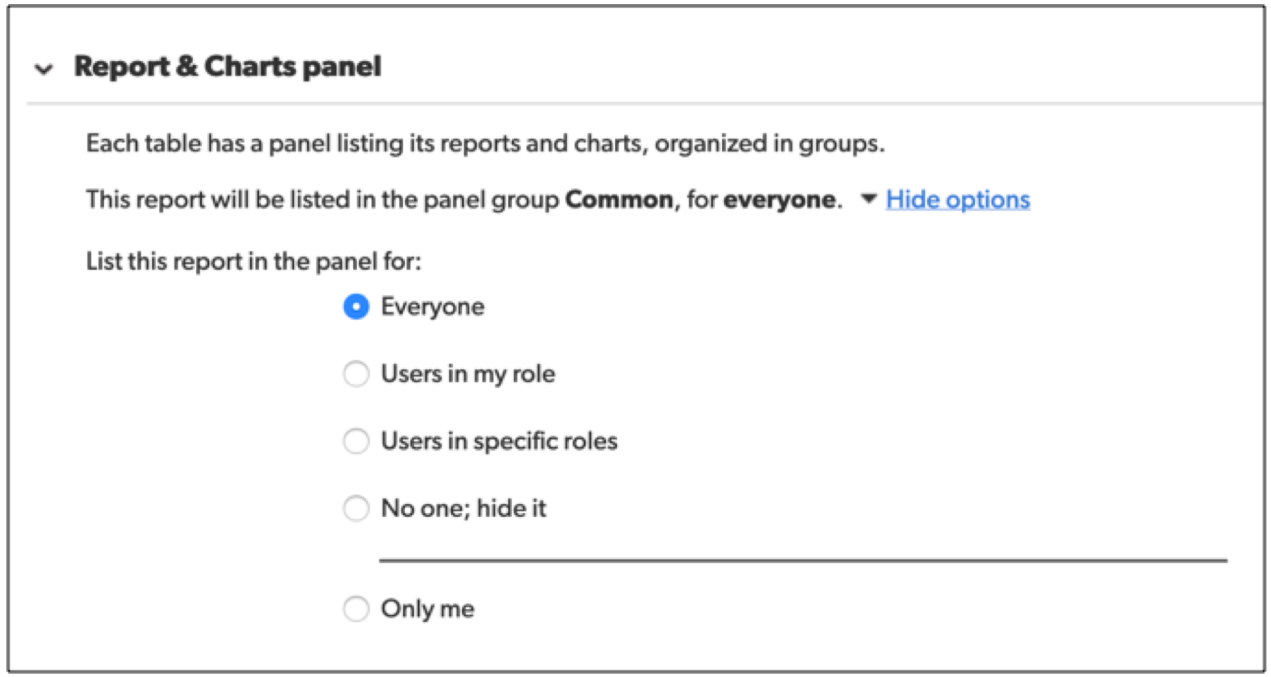
In toggle mode, instructional text can be shown when wanted. When toggled on, microcontent appears next to labels, fields, or settings.

Toggle mode is intended for longer interactions, like a page full of multiple settings, where reminders or occasional explanations are helpful, but static text could be distracting or cluttering. This mode also replaces the use of multiple tool tips.

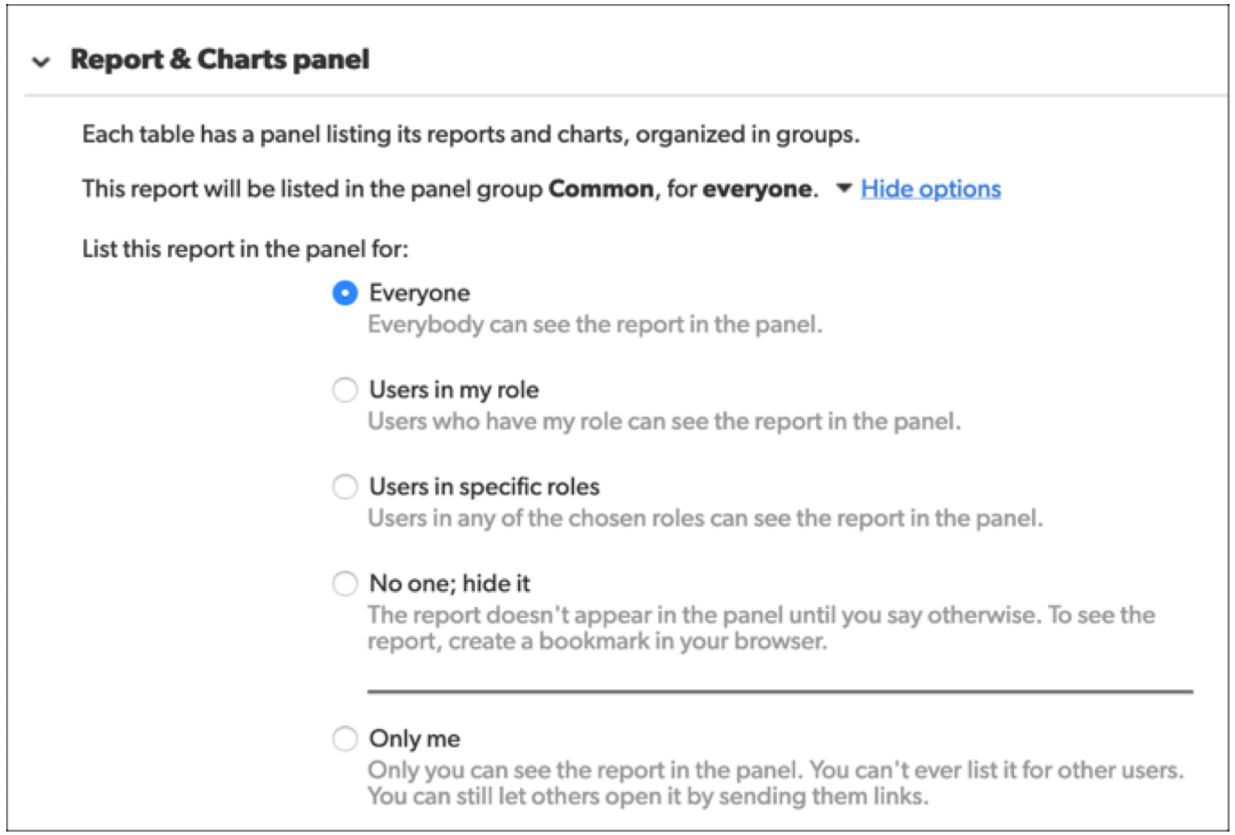
- ✓ Do: 10 or more items that can be explained.
- ✗ Don’t: Use for essential information that is required to complete a task

Toggle example

Portion of a page with instructional text toggled off



Portion of a page with instructional text toggled on



1 | Basic content | Tool tips

Tool tips can be used similarly to instructional text, to provide additional explanation for an action or task. The choice to use a tool tip would follow the use of labels and instructional text. Those patterns are recommended first before deciding to use tool tips.

- ✓ Do: Activated by the user via a hover or click.
- ✓ Do: Provide instructions to explain more:

- × Don't: Repeat the same information in a different way:
- × Don't: Use for critical or essential information, such as password requirements.

- × Don't: Tool tips should not appear without user intervention. Use a guidance pattern instead.

Second step: Assistance

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2 | Assistance

In-product assistance provides a deeper level of content, such as definitions, concepts, examples, best practices, procedures, steps, or demonstrations.

Assistance content can be text, images, videos – the right type of content to provide what's needed.

Assistance is **controlled by the user**. Typical assistance is accessed by the user by clicking, selecting, or choosing something that shows assistance. Alternatively, assistance may accompany an interaction, but the user can choose to hide the assistance.

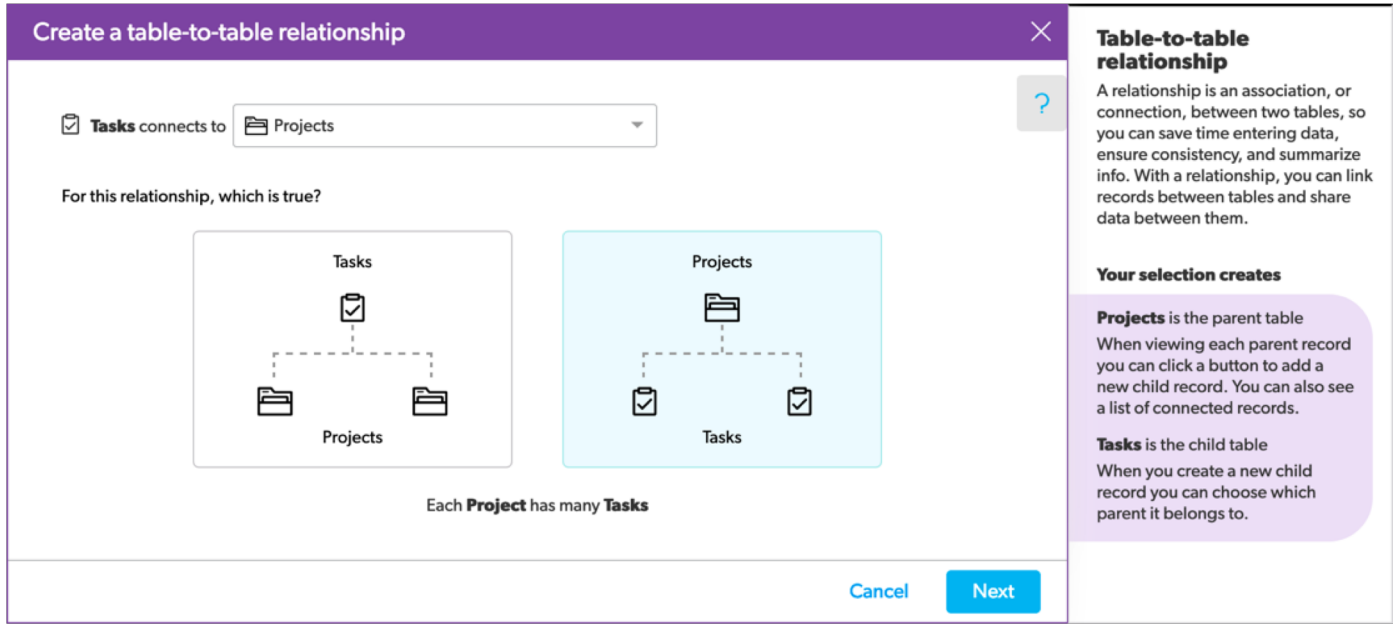
The recommended content pattern for assistance includes:

- **Context-sensitive**: Assistance is tailored to the action, dialog, or page.
- **Controllable**: The user can show or hide the assistance.
- **Unobtrusive**: The user can see the assistance while completing the task.
- **Persistent**: The user can complete the task while still reading the assistance.

2 | Assistance | Example

An example of this pattern is the help panel on dialogs.

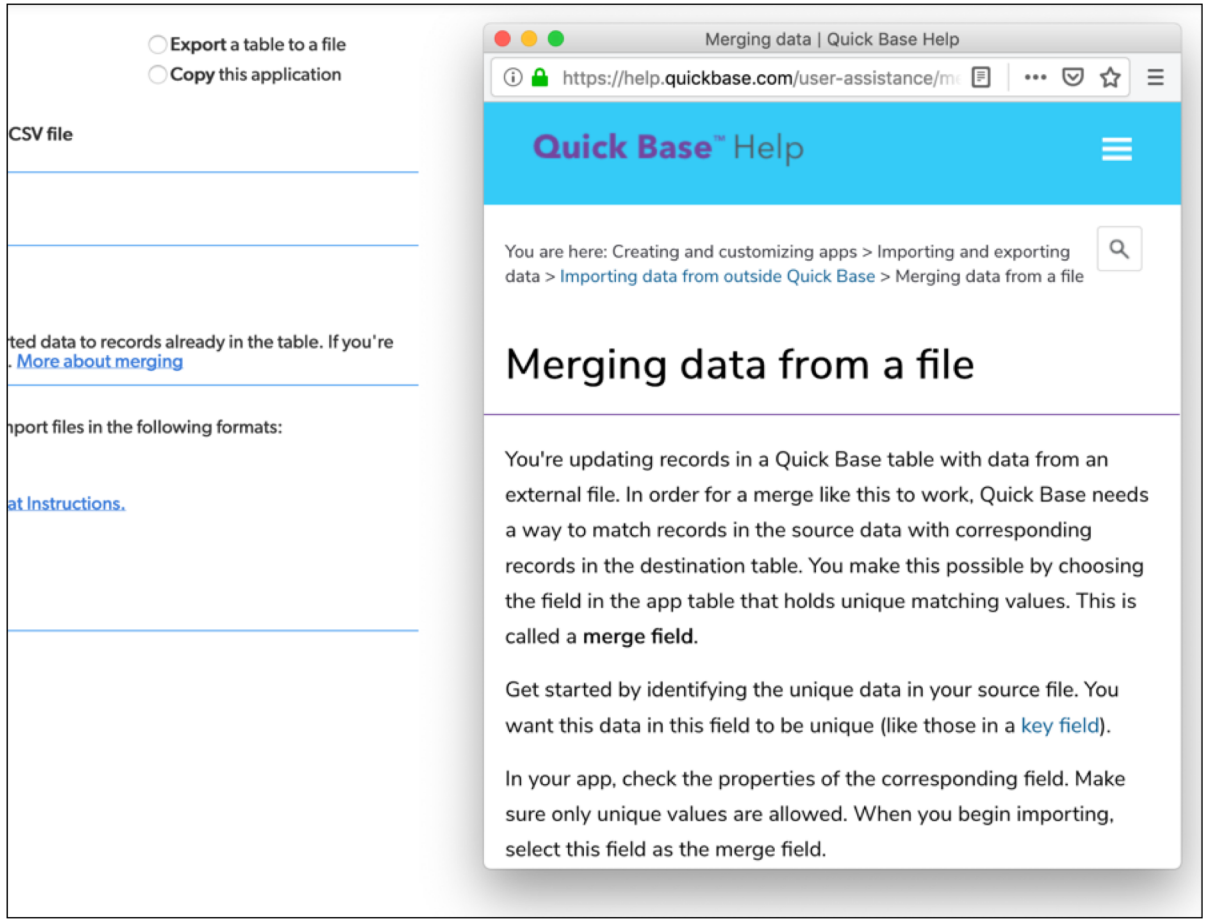
- **Context-sensitive**: Assistance is tailored to the action, dialog, or page.
- **Controllable**: The user can show or hide the assistance.
- **Unobtrusive**: The user can see the assistance while completing the task.
- **Persistent**: The user can complete the task while still reading the assistance.



2 | Assistance | Example

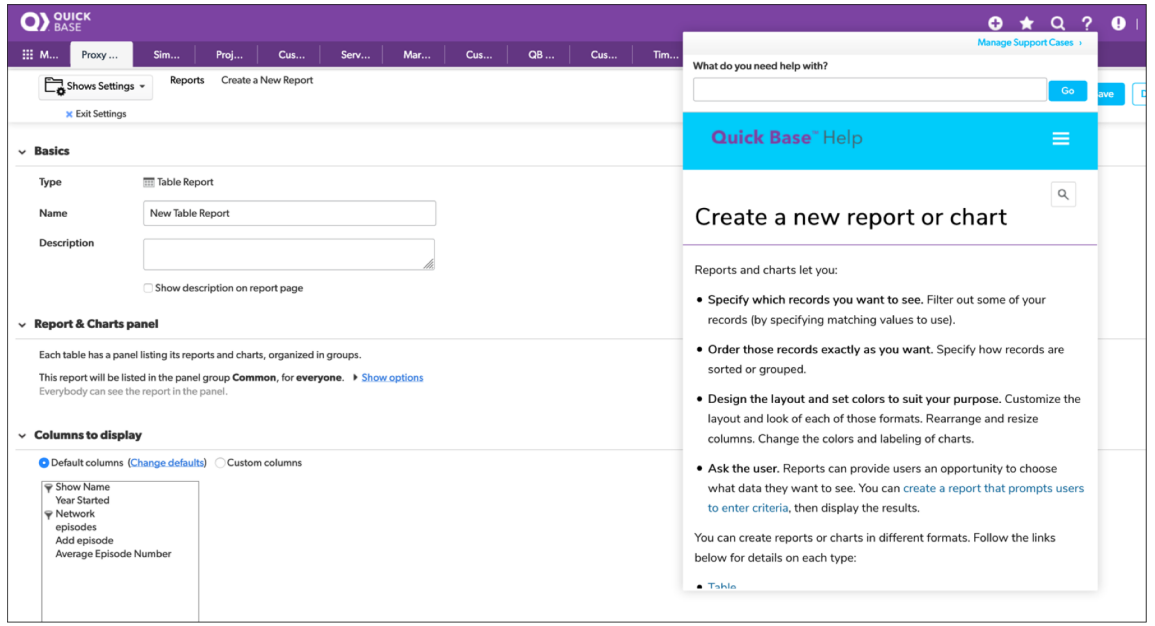
Linking to help is an example of assistance, however:

- ✓ **Context-sensitive**: Assistance is tailored to the action, dialog, or page.
- ✓ **Controllable**: The user can show or hide the assistance.
- ✓ **Unobtrusive**: The user can see the assistance while completing the task. (The assistance won't cover the task, but the user needs to arrange windows to see both at once.)
- ✗ **Persistent**: The user can complete the task while still reading the assistance. (Maybe, if they arrange browser windows.)



2 | Assistance | Future needs

- ✓ Do: A future example of this pattern for pages would be a similar help panel that slides in and out, perhaps from the right side of the page.
- ✓ Don't: The current help menu assistance meets 2 of 4 criteria.
  - ✓ It is (or could be) **context-sensitive**, and it is **controllable**.
  - ✗ It is **obtrusive** and it is not **persistent**.



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Step three: Guidance

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3 | Guidance

Guidance is more active than assistance.

Guidance content patterns do things like: prompt the user to take an action or point to a location of an interaction.

Guidance content patterns can also provide orientation or onboarding, to help explain concepts or benefits.

Guidance anticipates what the user needs and provides them with timely help, advice, or recommendations.

Although guidance appears without user intervention, it should always be controllable by the user (it can be hidden or dismissed, or restarted when wanted).

While assistance content can be friendly and assuring, the voice and tone in guidance can be even more so:

Encouraging language can be used to help educate:

- Congrats!
- Don't worry, this is easy
- Relax, we'll take care of it behind the scenes

Effusive language can be used to promote a new feature:

- Try it out!
- This new feature makes things easier.
- Presto! Here's a way to save time

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3 | Guidance | Examples

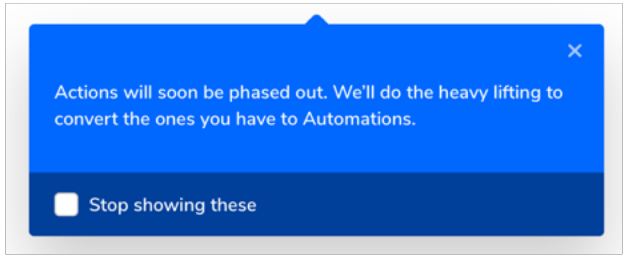
Guidance without content

A guidance pattern may not include specific written or video content. It may be an interaction that seeds an action or provides a cue. For example, in Visual Builder, rather than starting with a blank app, one empty table should be started for the user as a visual cue.

Guidance box

A guidance box appears for the user, to draw attention. A guidance box could be used for items such as:

- A new feature or changed features
- A recommended next action, such as creating a table or home page



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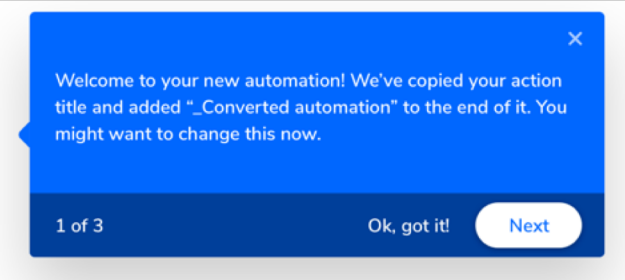
3 | Guidance | Examples

Guidance walkthrough

A series of guidance boxes appears for the user, to step them through a sequence. Examples could be:

- A series of actions to complete a task
- A set of new features
- Orientation to a page or navigation



Guidance explanation

A guidance explanation provides an overview of concepts and explains benefits. A typical use of guidance explanation dialog may be in an empty state, before a user has started anything.

✓ Do: Guidance explanations should appear in the **same interaction as used for assistance**.

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