



UI MESSAGES AND EMBEDDED HELP BEST PRACTICES

VERSION 1.0

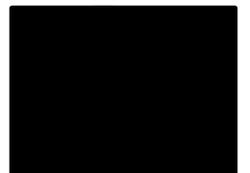


Table of contents

| | | |
|----------|---|----------|
| 1 | Overview | 4 |
| 1.1 | Intended audience | 4 |
| 2 | UI message types | 4 |
| 2.1 | Common writing guidelines for all message types | 4 |
| 2.1.1 | What to do | 4 |
| 2.1.2 | What not to do | 5 |
| 2.2 | Error messages | 6 |
| 2.2.1 | Format | 6 |
| 2.2.2 | Samples..... | 6 |
| 2.3 | Informational messages..... | 6 |
| 2.3.1 | Samples..... | 7 |
| 2.4 | Success messages..... | 7 |
| 2.4.1 | Samples..... | 7 |
| 2.5 | Warning messages | 7 |
| 2.5.1 | Samples..... | 8 |
| 2.6 | Confirmation messages | 8 |
| 2.6.1 | Samples..... | 8 |
| 3 | Embedded help | 9 |
| 3.1 | Icon help | 9 |
| 3.1.1 | When to use | 9 |
| 3.1.2 | Writing guidelines | 10 |
| 3.1.3 | Samples..... | 10 |
| 3.2 | Panel help | 11 |
| 3.2.1 | When to use | 11 |
| 3.2.2 | Writing guidelines | 11 |
| 3.2.3 | Samples..... | 11 |
| 3.3 | Persistent help | 12 |
| 3.3.1 | When to use | 12 |
| 3.3.2 | Writing guidelines | 13 |
| 3.3.3 | Samples..... | 13 |
| 3.4 | Tooltip help | 13 |
| 3.4.1 | When to use | 13 |
| 3.4.2 | Writing guidelines | 13 |
| 3.4.3 | Samples..... | 13 |

Document revision history

| Release number | Revision date | Description of changes |
|----------------|----------------|------------------------|
| 1.0 | March 28, 2018 | New document |

1 Overview

This guide contains usage guidelines for writing UI messages and embedded help content. In this guide, you will find best practices, descriptions, and examples for the following:

- Error messages
- Informational messages
- Success messages
- Warning messages
- Confirmation messages
- Icon help
- Panel help
- Persistent help
- Tooltip help

1.1 Intended audience

This document is intended for [REDACTED] and other individuals who are tasked to write and edit UI messages and embedded help.

2 UI message types

A UI (user interface) message is a system generated message that displays on end user applications to provide important status information or to request user confirmation on an action.

UI messages are categorized by type according to the purpose of the message. Each type has a distinct styling (color theme, font and icon).

Supported UI message types are:

- Error
- Informational
- Success
- Warning
- Confirmation

2.1 Common writing guidelines for all message types

The following guidelines apply to all message types.

2.1.1 What to do

Guidelines to follow when writing UI messages.

- Use an existing message when possible

- Follow subject-verb-object sentence structure
- Use active voice and “you,” except in error messages where you want to avoid an accusatory tone
- Use the present tense; if you must use past or future, use simple verb forms, for example: Message sent.
- Write each message to be clear, concise, and consistent.
 - Clear – message should be reviewed for ambiguity
 - Concise – message should use as few words as possible without negatively affecting the information conveyed. For example, remove common introductory phrases such as “*Would you like to save your changes?*” or “*Are you sure you want to delete this record?*”
 - Consistent – use language that is consistent with the UI. For example, if the UI is using the term “policy,” do not use “standard” in messages
- Use sentence capitalization
- Use a friendly tone of voice
- Focus on the user rather than what the application is doing. For example, use “Get started with these popular articles,” not “To get you started, we are you showing you popular articles.”
- Describe only what users need to know: do not elaborate
- Use sentence capitalization
- Limit to three sentences or fewer

2.1.2 What not to do

Guidelines for what not to do when writing UI messages:

- Do not use words in place of numbers, such as “You have three messages.” Save screen space and write “You have 3 messages.”
- Do not use jargon and idioms
- Do not use contractions
- Do not use abbreviations and acronyms, but it’s okay to use if the targeted persona will know
- Do not enclose an entire passage of message text in parentheses, brackets, braces, or quotation marks
- Do not use the word “please” or “sorry”
- Do not use exclamation marks or all caps
- Avoid using the past tense and gerunds (for example, use “create” instead of “created” or “creating”)
- Do not mix “me”/“my” with “you”/“your” (for example: Change your preferences in My Account. Instead use: Change personal preferences in My Account.)
- Do not use the words “always” or “never”
- Avoid using exclamation points, because they can come across as shouting
- Do not blame the user. For example, do not write: You have entered an incorrect number. Write: Enter a number between 1 and 10.
- Do not state the obvious, such as “Enter the name in the Name field”

2.2 Error messages

Error messages alert a user that an error has occurred and the user must act before the system can continue. For example, a form was not saved or required additional information.

Error messages do not have titles and do not have action buttons.

In development terms, errors are also considered hard checks, whereas warnings are considered soft checks.

2.2.1 Format

The general format is as follows:

<State the error>. <Provide information as to what the user can or should do>

User already exists. Enter a unique name for the user.

Describe only what users need to know. Keep the message as short as possible with a maximum of three sentences.

2.2.2 Samples

Example uses for error messages:

- A user tries to create a record that already exists
- A user tries to delete a record that is being used by the application
- A user initiates an action that does not complete successfully
- The system encounters form validation errors, such as missing required fields
- The system encounters an error that affects the user's activity or session



The screenshot shows a form with a red error message banner at the top. The banner contains a red exclamation mark icon, the text "The following error has occurred:", and "User Name: Required field". Below the banner is a text input field labeled "User Name *". A callout box points to the error message with the text: "The error message is 'Required field'. The rest of the text is provided by the system."

2.3 Informational messages

Informational messages provide the status of the system such as the UI and user account. For example, a message informs the user of the number of failed login attempts.

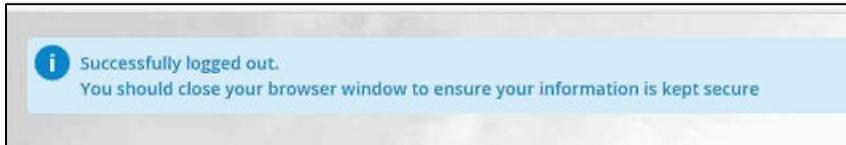
Informational messages do not have titles or action buttons.

Describe only what users need to know. Keep the message as short as possible with a maximum of three sentences.

2.3.1 Samples

Example uses for informational messages:

- A user tries to delete multiple items where some can be deleted, but others cannot.
- A user submits a form for approval.
- The system provides the user a tip such as to close the browser to secure information.



2.4 Success messages

Success messages alert the user about the successful completion of a task, such as submitting a new user, saving a file, or creating a new team.

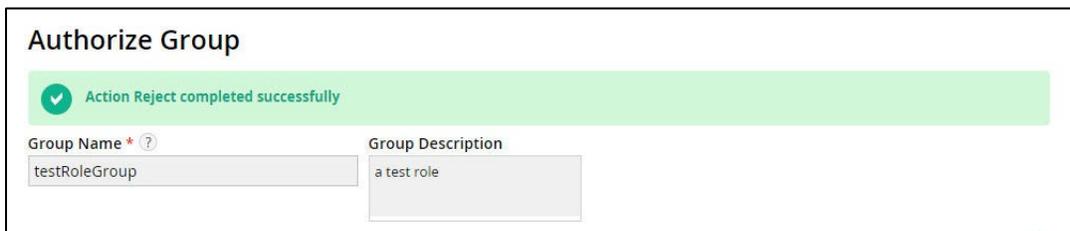
Success messages do not have titles or action buttons.

Describe only what users need to know. Keep the message as short as possible with a maximum of three sentences.

2.4.1 Samples

Example uses for success messages:

- User successfully submits a scheduled job request.
- User successfully deletes a record.
- The application successfully generates a report for the user.



2.5 Warning messages

Warning messages indicate potential problems on which the user may have to act but allow the system to continue. For example, the system has suspended an endpoint for a given interval, or a disk data source is approaching a file full condition.

Warning messages do not have titles or action buttons.

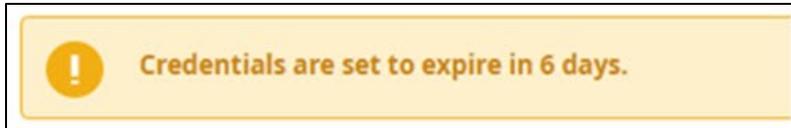
Describe only what users need to know. Keep the message as short as possible with a maximum of three sentences.

In development terms, warnings are also considered soft checks, whereas errors are considered hard checks.

2.5.1 Samples

Example uses for warning messages:

- A user's battery is low, and he or she must use a power outlet.
- Data connections are disabled.
- A file is from an unsafe source.



2.6 Confirmation messages

A confirmation message appears in response to a user action. It requires the user to respond to continue or cancel the action.

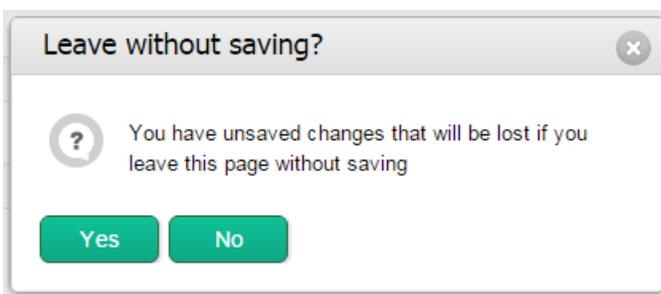
Confirmation messages have a title that is written as a question and provide one or more buttons, such as OK, Cancel, Yes, and No.

Tip: Instead of using general buttons such as OK, Cancel, Yes, and No to confirm actions, label buttons with the action, which prevents errors if the user does not read the message. For example: Delete this record? Delete | Keep

2.6.1 Samples

Example uses for confirmation messages:

- Tasks that require the user to confirm an action before it is completed
- Information about the results of the action if the user continues. For example, if an action cannot be undone, or it would take a lot of work to fix it or configure it again.



3 Embedded help

Embedded help is user assistance that is integrated into the user interface of an application. It is considered integrated because the user assistance consists of several messages, where each message is associated directly with a UI page, heading, area of a page, field, button, user workflow, or system event. Each message typically consists of a few words, a few sentences, or in some instances, a small topic.

We use icon, panel, persistent, and tooltip help. The recommendations in this section are based on industry best practice and user research.

Embedded help is distinguished from other forms of help such as manuals and online help in that it is shown within the context of a UI page and is not available separate from the page. However, the help can be edited and updated by IDs and other administrators using available tools.

There is more to embedded help than just the message. The message must be shown on the UI page according to defined styles and behavior. Embedded help is an effort that consists of multiple teams, each assigned an area of responsibility that pertains to content, presentation, and behavior as follows:

- **Actions and events:** During development, various teams determine user actions and system events for when an EH message is to display. The error, informational, warning, success, and confirmation patterns are used for user actions and system events.
- **Content:** [REDACTED] responsible for writing embedded help messages. The [REDACTED] guidelines apply, along with the best practices discussed in this guide.
- **Presentation:** [REDACTED] is responsible for ensuring that embedded help messages appear according to the [REDACTED] brand and approved styles. The styles include, but are not limited to, fonts, colors, text size, and icons.
- **Behavior:** [REDACTED] is responsible for defining how embedded help appears. This includes timeouts for when a message is removed automatically, where a message appears on the page, and whether the message must be manually closed.

3.1 Icon help

Icon help appears when the user clicks an icon, such as a question mark, on the page. This type of help is most commonly used for fields and field labels.

3.1.1 When to use

Use to provide the following information:

- A short description to clarify the subject of the field.
- A description of the values of the field. For example, define the values of drop-down options.
- Validation requirements. For example, you can only enter numbers between 1-10.
- Format requirements. For example, if a user must enter a comma-separated string of characters.
- Unique behavior. For example, a certain value or selection can activate or hide another field, or cause a non-required field to be required.
- How a field is uniquely used in a task.

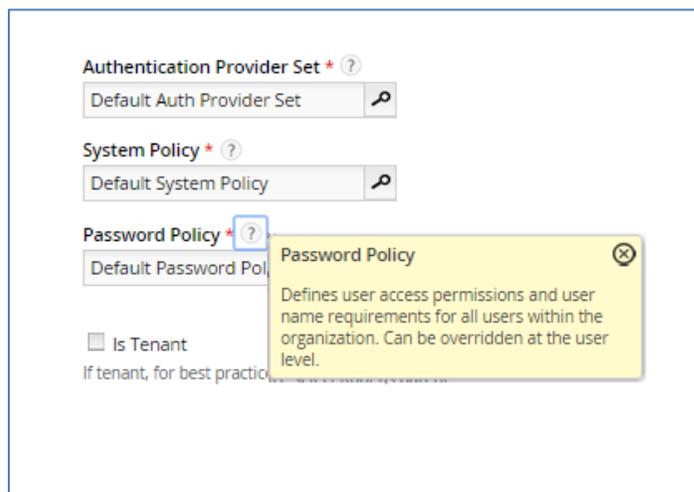
3.1.2 Writing guidelines

- Use complete sentences
- Limit to three sentences
- Include examples
- Use plain text only and avoid rich text such as bolding or bullets

3.1.3 Samples

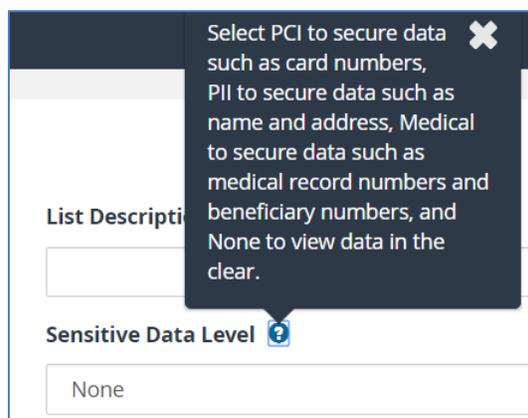
Examples of icon help:

1. A short description to clarify the subject of the field.



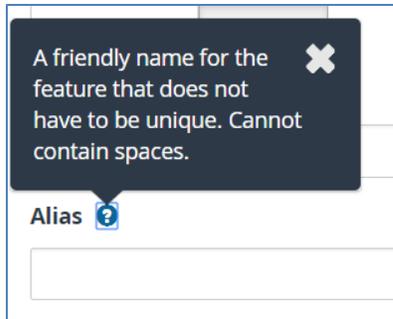
The screenshot shows a form with three fields: "Authentication Provider Set", "System Policy", and "Password Policy". Each field has a search icon to its right. A help tooltip is displayed over the "Password Policy" field, containing the text: "Password Policy Defines user access permissions and user name requirements for all users within the organization. Can be overridden at the user level." Below the fields, there is a checkbox labeled "Is Tenant" and a note: "If tenant, for best practice".

2. A description of the values of the field. For example, define the values of drop-down options.



The screenshot shows a form with two fields: "List Description" and "Sensitive Data Level". The "Sensitive Data Level" field has a help icon to its right. A help tooltip is displayed over the "Sensitive Data Level" field, containing the text: "Select PCI to secure data such as card numbers, PII to secure data such as name and address, Medical to secure data such as medical record numbers and beneficiary numbers, and None to view data in the clear." Below the fields, the "Sensitive Data Level" field has a dropdown menu with the option "None" selected.

3. Validation requirements. For example, you can only enter numbers between 1-10.



3.2 Panel help

Panel help contains more extensive information about the page or a section of a page. For example, panel help can be used for multiple field descriptions, workflow information, or task information.

A best practice is to use this type of help to provide detailed examples, explanations, or step-by-step instructions that are limited to workflow information. Use sparingly for items that are not used often in the software or complex items that users will not remember.

Panel help is typically a side panel that displays when you click a **Help** link on the page. The Help link only shows if panel help is available.

3.2.1 When to use

Use panel help when it's necessary to provide extensive page- or section-level help such as the following:

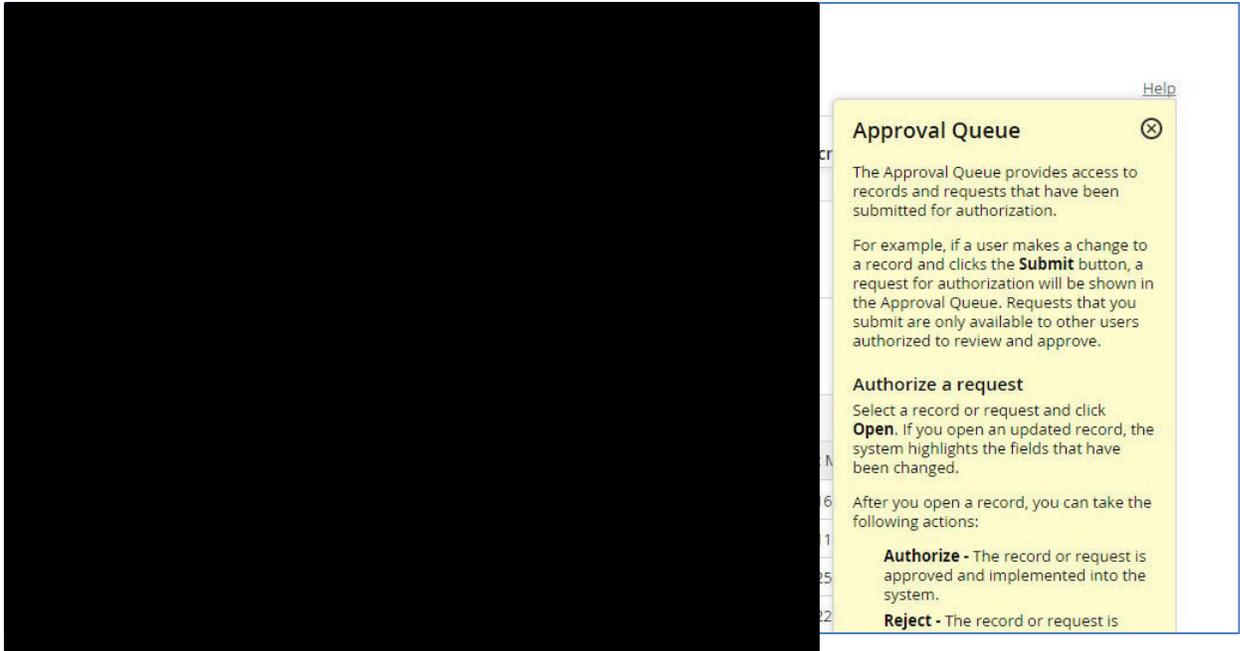
- Describing the various actions and tasks on a screen
- Explaining multiple field descriptions, parameters, or examples
- Describing overview information for the page or section, unless you can include this information as persistent help under the title or heading
- Describing complex areas of the software

3.2.2 Writing guidelines

- While panel help is the most extensive type of embedded help, text must be succinct and use complete sentences
- Panel help can include links to additional information within the embedded help environment
- Panel text has a title and appropriate text

3.2.3 Samples

1. Overview and workflow information



2. Overview information



3.3 Persistent help

Persistent help is text that always appears on the UI.

This type of help is used sparingly. It is best suited for UI titles and headings. However, it can also occasionally be used on a field or group of fields.

3.3.1 When to use

Use to provide the following information:

- The purpose of the page or a group of fields
- A list of valid values or the formatting for a field. For example, showing a valid date format - MM/DD/YYYY
- A description of the contents of the field. For example, on large text fields this can describe what the user can enter in the field or the read-only content

3.3.2 Writing guidelines

- 1-3 sentences if text is for a UI title or heading
- Can be an incomplete sentence if for a field or group of fields. Text should not exceed the length of the field or group of fields.

3.3.3 Samples



The screenshot shows a search filter UI element. It has a title "To" and two input fields. The first field contains the date "08/11/2015" and the second field contains the time "11:59 PM". Below the input fields, there is a text label "Search limited to max 180 days from the current date." with a red arrow pointing to it from the right.



The screenshot shows a decoded certificate UI element. It has a title "Decoded Certificate" and a large, empty text area. Below the text area, there is a text label "Read-only decoded certificate information for review and verification." with a red arrow pointing to it from the right.

3.4 Tooltip help

Tooltip help is content that appears when a user moves the cursor over a button or icon. The help disappears after the cursor is moved away from the UI object.

3.4.1 When to use

Use to provide the following information:

- Describes the function of an icon
- Describes the function of a button

3.4.2 Writing guidelines

- Usually a few words or an incomplete sentence
- Typically, no more than 7-9 words
- Used sparingly to avoid distracting the user

3.4.3 Samples



