Learning Merlin with WarpGuide

IBM tackles OS/2 Warp 4.0 training and ease of use. By David P. Both

IBM's latest version of OS/2, code-named Merlin and officially called OS/2 Warp 4.0, has two important features that are instrumental in making the operating system easier to learn and use than its predecessors. One of these new features, the WarpGuide, is brand new; the other is an enhanced online tutorial. Taken together, these two features can make life easier for anyone who needs to learn—or teach—OS/2 Warp 4.0.

Everything actually starts at the Assistance Center, a new top-level folder that contains the old Information folder, many of the online books and readme files, and the WarpGuide and tutorial.

WarpGuide

WarpGuide is a single intelligent entity within OS/2 Warp 4.0 that is designed to facilitate your interaction with the user interface. One key component is a set of informative Cue Cards that appear on certain InfoBox pages. These Cue Cards provide guidance and explanations for specific fields on selected pages of the InfoBox. The other component is the "Guides," analogous to Windows 95's Wizards. Guides are alternative, simplified methods for performing some common tasks, such as adding a printer, adding program object, customizing the system, or finding objects on the hard disk.

WarpGuide can provide guidance for users with different levels of expertise. A new user can register with WarpGuide using the "User Check-In for WarpGuide" GUI. By registering the names of multiple users and specifying the level of experience each has, WarpGuide can provide customized assistance to different users of the same machine. It is only necessary to tell OS/2 which user currently is using the system.

Figure 1 shows the User Check-In for WarpGuide. No, the Cue Card displayed above the area of the window, outline around the area of the window with which the user is currently working, and the shading over the rest of the window. These three elements of WarpGuide are used to focus the user's attention on the specific area of the window for which guidance is provided.

The Cue Cards

WarpGuide's Cue Cards provide brief advice and guidance for OS/2 users attempting to perform some common tasks. They are not designed to provide in-depth information; which is available by pressing Control clicking on the Help button.

IBM refers to WarpGuide as an intelligent agent, meaning that it keeps a database of the user's interactions with the system. A task and changes the presented information to novice, intermediate, or expert level accordingly.

An overview portion of the Cue Card contains additional information that is particularly useful to a user. The overview usually provides more detailed description of the task to be performed, along with some additional information about how to perform it. Click on the Information button on the Cue Card to get a pop-up that allows you to turn on an overview or manually override the experience level.

Compare the information on the plain mouse pointers on the Cue Card. Figure 2 to the overview infor
for the same task displayed by the Cue Card in figure 3. The additional information in the overview describes everything you can do to customize the mouse. The task-specific information covers the selection of pointers. Notice the difference between the intermediate text in Figure 3 and the advanced text in Figure 2. In addition, the advanced mode doesn't display shading—only outlines remain, helping the user focus on the portion of the window referred to by the Cue card text.

WarpGuide Cue Cards are designed to focus the user's attention. The Cards are useful for users who have had some training on OS/2 but need some coaching to enable them to properly complete the tasks. Cue Cards provide very guidance to users inserting it and automatically become less obstructive as the user gains experience. They can be used to reinforce whatever training a user has had.

**The “Guidance on...” tools**

WarpGuide “Guidance on...” tools—I call them Guides—provide new users with easy, alternative methods for performing common tasks. They are especially useful when a user has little or no training on the tasks that the Guides cover. These Guides can be used instead of OS/2 Warp.0’s properties infoboxes (which replace the OS/2 Warp.x Settings notebooks) to perform tasks such as adding a printer object. (More experienced users can still use the properties infoboxes directly.)

How do you get to the Guides? Activate the WarpCenter, click on the Assistance Center Icon, and open the WarpGuide folder. Then click on the specific Guide for the task you want to perform. You can also open the assistance Center folder on the desktop, then open the WarpGuide folder, and select the Guide you want (Figure 4).

To obtain guidance on adding a printer, click on the Guide of that name and follow the instructions that appear. You will be taken step by step through the process of creating a printer object.

Figure 5 shows the window in which the printer is named. Using a template is faster and easier for experienced users, but these Guides provide new users with highly focused, discrete subtasks to perform, rather than making them guess at items in a notebook. Very explicit instructions accompany each subtask to help avoid any confusion.

Figure 6 shows the dialog box for choosing a printer. This task is simplified for new users who have a printer that is unsupported by IBM. Clicking on the “I have a disk” button leads to a dialog that lets the user specify the location of the disk containing the driver. The printer driver is then installed from the selected disk.

The Guides offer inexperienced users an alternative to the more complex properties infoboxes, providing a way for those without a great deal of training or knowledge to configure some aspects of OS/2. This capability can be a double-edged sword, however, because some IS managers won’t want their users to make configuration changes to the operating system. Those IS managers may want to delete the existing Guides so their users don’t have access to anything that can alter the system configuration in any way.

The biggest failing of WarpGuide—at least in the Merlin beta—is that none of the Guides or Cue Cards help with OS/2’s networking and connectivity setup. Because OS/2 Warp 4.0’s powerful networking features are big selling points, the lack of WarpGuide support for them is a significant weakness.

IBM’s WarpGuide development team is creating a toolkit—to be shipped in a future release of the Developer Connection CD-ROM—that will allow application developers to create Guides and Cue Cards for their own applications.
The new tutorial
Did you run the tutorial included with OS/2 Warp 3.0? According to IBM, about one-third of all OS/2 users have tried the tutorial. If that number is correct, it's just far too small! A tutorial should be the first place for new users to explore a new operating system and its unique features and to practice basic operations. OS/2 Warp 4.0's tutorial was not included in the beta because it wasn't ready. However, while I was in Austin, Tex., participating in an task group to help develop the Merlin certification test, I was able to work with the unfini products. (My thanks to IBM's Larry Adams, who facilitated my access to the tutorial, and to Jill Timm, new tutorial's creator.)

The new tutorial has four sections: Base Operating System, Connect, VoiceType, and Help. These sections are fairly short and easy to complete in a reason amount of time—and well under an hour in each case. The Help section is the shortest and should only take ten minutes.

When I sat down at the tutorial, I registered as a new user but did not train the VoiceType system to recognize my voice path. With the exception of a few command words that had not yet been incorporated into VoiceType, I was able to successfully navigate the tutorial using voice commands, including the practice exercises.

One powerful feature is the tutorial's ability to provide a real deal on which users can practice the abilities that they have been learning. The beauty of this feature for users is that they can use the same methods for navigating the tutorial as they can for practice and normal usage, whether that method is the keyboard, mouse, voice, or any combination of methods. As a result, navigation is consistent between the learning environment and the real one.

A course of study
As a consultant, I generate proposals that include training for end users part of the consulting package. When the time comes for training, however, the users can't spare the time to go to a class. Ten or two minutes of so-called instruction is the machine's previous user is training; neither is grabbing a
minutes from a busy IS person. Users are often shown, not taught, the keystrokes or mouse input required to perform specific job tasks. They are seldom trained on the basic tasks of the environment in which they work.

A training course has specific objectives that must be met and must be measurable. When a user can perform the tasks required to meet the objectives of the course, the user can be considered trained.

OS/2 Warp 4.0's tutorial has been designed with a specific set of educational objectives in mind. It will train a beginner to use the OS/2 user interface, the voice recognition capabilities, the basic network functions such as logging on and using network directories and printers), and the online help.

WarpGuide is a complex, sophisticated adjunct to the tutorial, the online OS/2 help, and the documentation. With WarpGuide, IS managers have at hand a pair of top-notch training tools within OS/2 Warp itself. Users will typically take two to four hours to complete the tutorial, depending on their initial level of knowledge and skill and the speed at which they learn. Add to the tutorial WarpGuide's ability to simplify some common tasks and provide online, real-time assistance, and you have an unbeatable combination for organizations needing to improve OS/2 Warp skills. Those IS professionals with training responsibilities would do well to use these tools, which are readily available and free.

Users should complete the tutorial; it only takes a short time. Trainees should be encouraged to use the tutorial's Practice facility to ensure that they can actually perform the tasks about which they are reading. Ideally, they should be given an environment in which they will be uninterrupted by their daily jobs, such as a classroom setting. However, if classroom facilities, instructors, and an IS department are lacking, four relatively short sessions with the tutorial at his or her desk should take the new user through all four sections.

All things considered, the changes that IBM has made to ease learning and using OS/2 Warp are a giant step in the right direction. IS managers and trainers should be very happy with these aspects of OS/2 Warp 4.0.

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