Design Principles And Usability Heuristics

You can avoid common design pitfalls by following these rules-of-thumb for design

You can inspect an interface for usability problems by applying these same principles

James Tan

Design Principles And Usability Heuristics

Broad "rules of thumb" that describe features of "usable" systems

Design principles

- Broad usability statements that guide a developer's design efforts
- Derived by evaluating common design problems across many systems

An evaluation tool

- Same principles used to "evaluate" a system for usability problems
- Becoming very popular
 - User involvement not required
 - Catches many design flaws

<u>Design Principles And Usability Heuristics</u> (Advantages)

Discount usability engineering

- A few general guidelines can correct for the majority of usability problem
- Easily remembered, easily applied with modest effort
- Cheap and fast way to inspect a system
- Can be done by:



Double experts





End users

Iomas Tom

Design Principles And Usability Heuristics (Weaknesses)

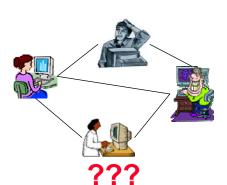
Principles are more or less at the motherhood level

- Can't be treated as a simple checklist
- Subtleties involved in their use
- Example:

Heuristics for many collaborating users

Heuristics for a single user





1. Simple And Natural Dialogue

Use the user's conceptual model

Match the users' task in as natural a way as possible

• Minimize mapping between interface and task semantics







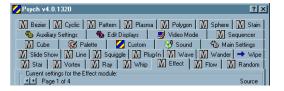


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1. Simple And Natural Dialogue



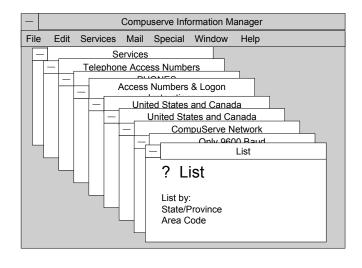




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1. Simple And Natural Dialogue

Menu or window? Which window?



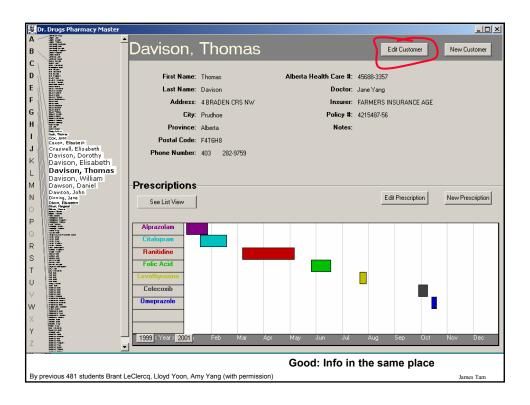
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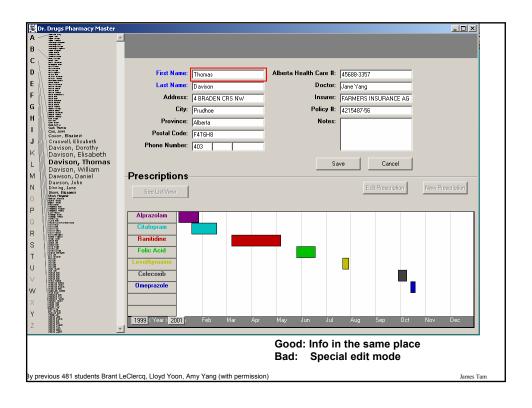
1. Simple And Natural Dialogue

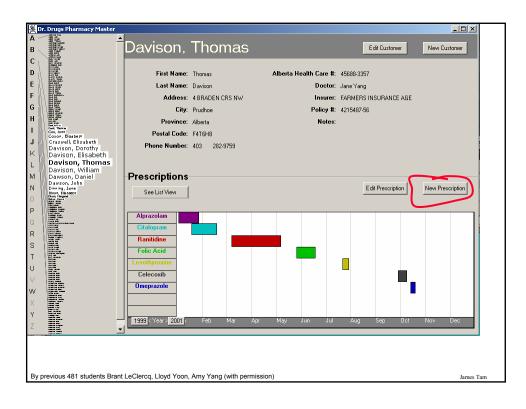
Present exactly the information the user needs when it is needed

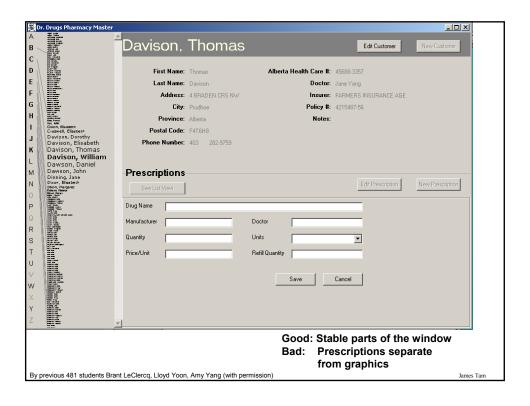
- · Less is more
 - Less to learn, to get wrong, to distract...
- Remove or hide irrelevant or rarely needed information
 - Competes with important information on screen
- Information should appear in natural order
 - Order of accessing information matches user's expectations
 - Related information is graphically clustered
- Minimize or mitigate modes
- Use windows frugally
 - Don't make navigation and window management excessively complex

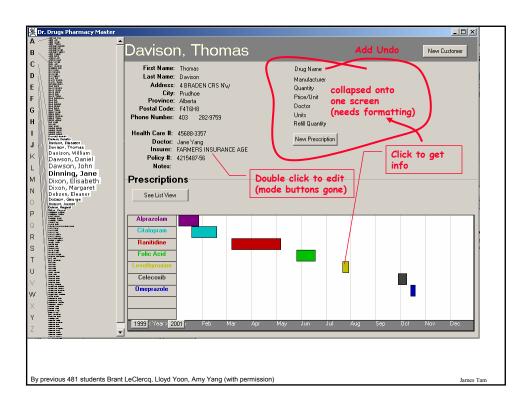
James Tan

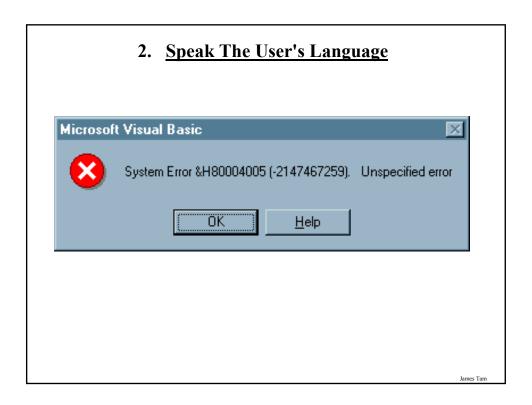












2. Speak The User's Language

Terminology based on users' language for task





Use meaningful mnemonics, icons, and abbreviations

- eg File / Save
 - Ctrl + S

(abbreviation)

- Alt FS

(mnemonic for menu action)

- Open folder

(tooltip icon)

Microsoft F

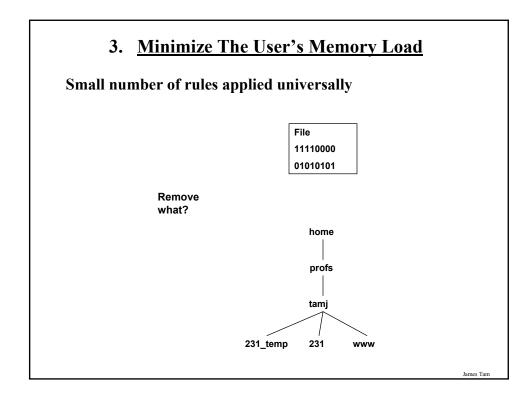
Inmos Ton

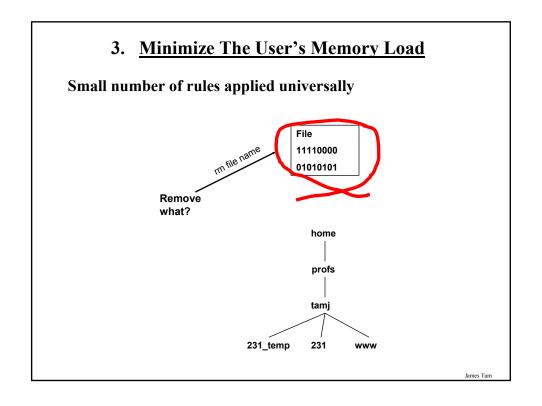
3. Minimize The User's Memory Load

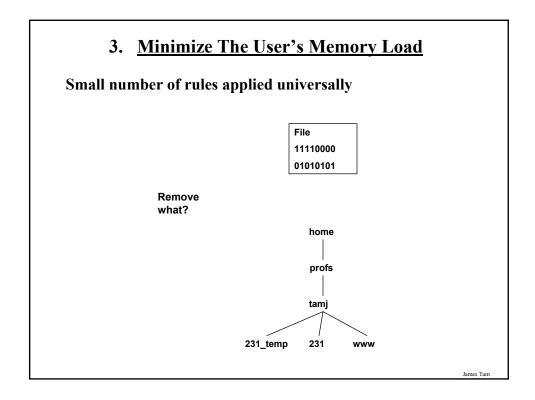
- •Describe required the input format, use examples, provide default inputs
- •Promote recognition over recall

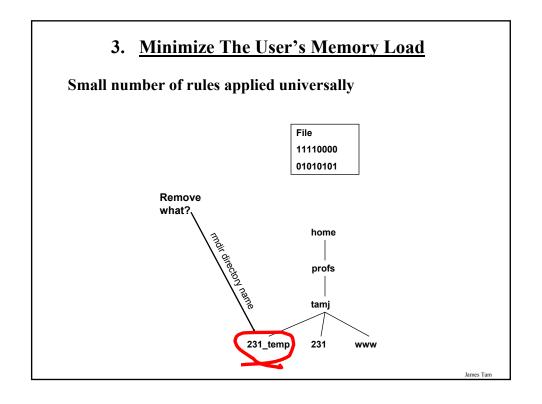












4. Be Consistent

Consistency of effects

- Same words, commands, actions will always have the same effect in equivalent situations
- Makes the system more predictable
- Reduces memory load

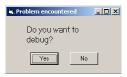
4. Be Consistent

Consistency of language and graphics

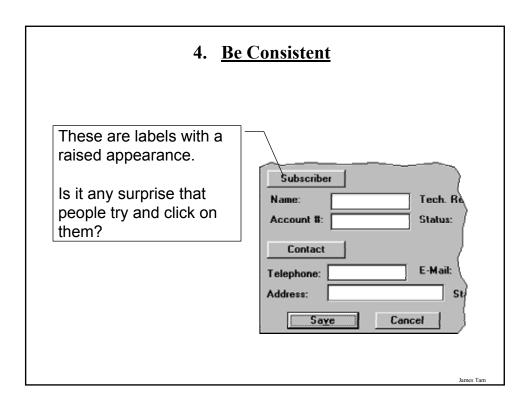
- Same information/controls in same location on all screens / dialog boxes forms follow boiler plate
- Same visual appearance across the system (e.g. widgets)

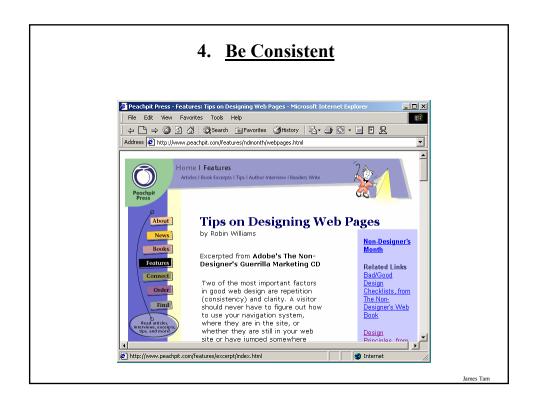




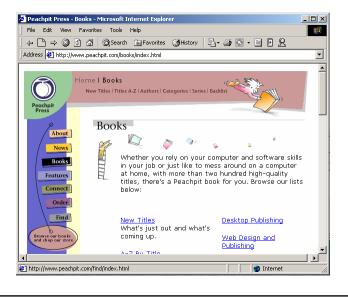


Save As	_O×
Are you sure you want to exit without saving?	
No	Yes





4. <u>Be Consistent</u>

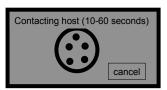


5. Provide Feedback

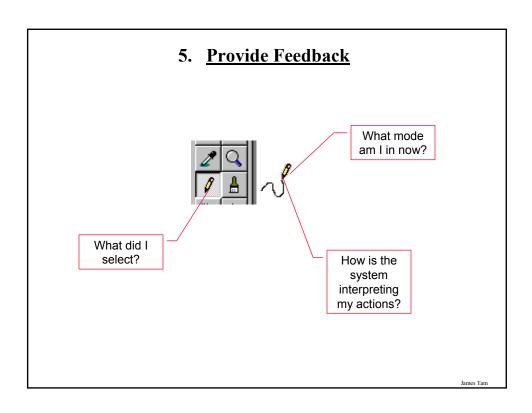
What is the program doing?

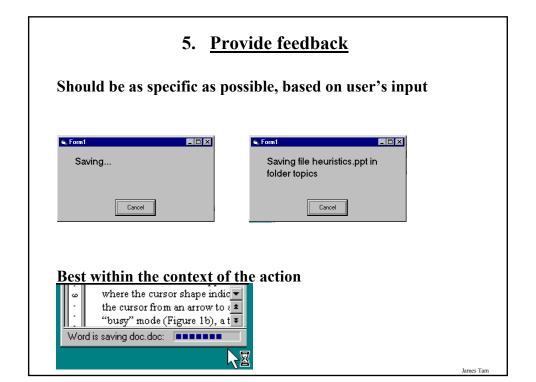


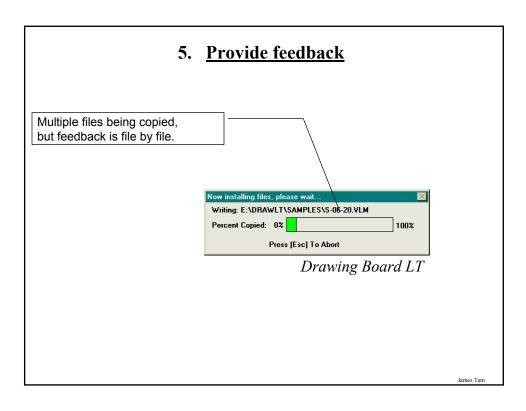








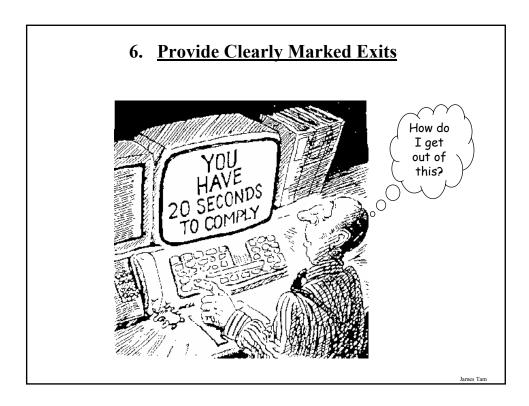




5. Provide feedback

Feedback response time

- How users perceive delays
 - 0.1 Second max: perceived as "instantaneous"
 - Seconds max: user's flow of thought stays uninterrupted, but delay noticed
 - 10 Seconds: limit for keeping user's attention focused on the dialog
 - > 10 Seconds: user will want to perform other tasks while waiting



6. Provide Clearly Marked Exits

Universal Undo

• e.g., <Ctrl>-<Z> and <Ctrl> <Y>

Progress indicator & Interrupt

• Length operations



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6. Provide Clearly Marked Exits

Restoring defaults

• Getting back original settings





Wing Commander: Privateer © Origin-EA

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7. Provide Shortcuts

Keyboard accelerators



Name completion

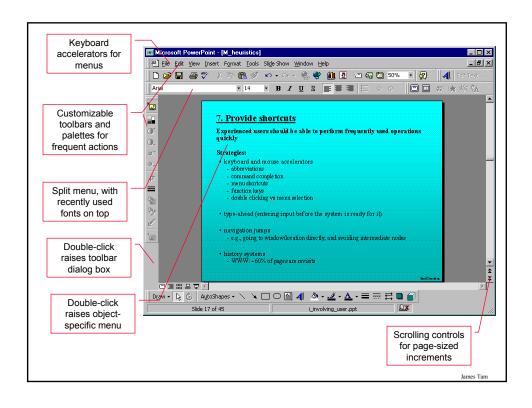


7. Provide Shortcuts

Experienced users should be able to perform frequently used operations quickly

- Type-ahead (entering input before the system is ready for it)
- Navigation jumps
 - e.g., going to window/location directly, and avoiding intermediate nodes
- History systems
 - WWW: ~60% of pages are revisits





8. <u>Deal With Errors In A Helpful And</u> <u>Positive Manner</u>

People will make errors!

Errors we make

- Mistakes
- Slips



Image and sound file from "The Simpson's"

James Tam

8. <u>Deal With Errors In A Helpful And</u> <u>Positive Manner</u>

Mistakes

 Arise from conscious deliberations that lead to an error instead of the correct solution



Slips

- Unconscious behavior that gets misdirected en route to satisfying goal
 - e.g. drive home wanting to pick up something at a store, go all the way home instead.
- Shows up frequently in skilled behavior
 - Usually due to inattention
- Often arises from similarities of actions

```
[csb 481 16 ]> rm *
rm: remove file1 (yes/no)? y
rm: remove file2 (yes/no)? y
rm: remove file3 (yes/no)? y
rm: remove file4 (yes/no)? y
rm: remove file5 (yes/no)?
```

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Types Of Slips

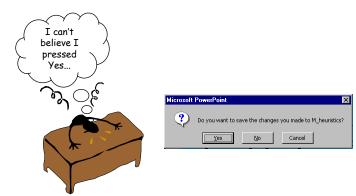
- 1) Capture error
- 2) Description error
- 3) Loss of activation
- 4) Mode error

James Tam

Types Of Slips: Capture Error

Frequently done activity "captures" the intended activity

- Occurs when common and rarer actions have same initial sequence
- "Force of habit results in the slip"



Types Of Slips: Description Error

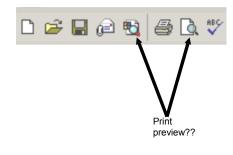
Intended action has much in common with others that are possible

- Usually occurs when right and wrong objects physically near each other
- "Perform the right action but on the wrong object"
 - e.g., Pour juice into bowl instead of glass



James Tan

Types Of Slips: Description Error (2)



James Tan

Types Of Slips: Loss Of Activation

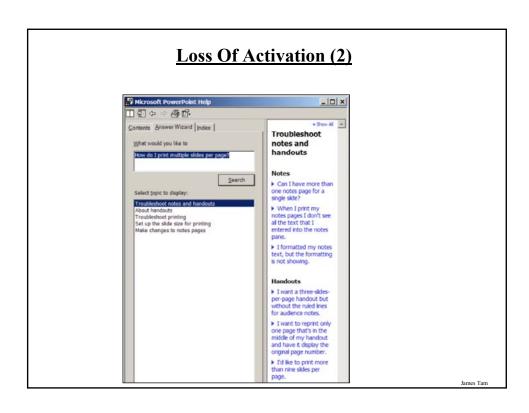
Loss of activation

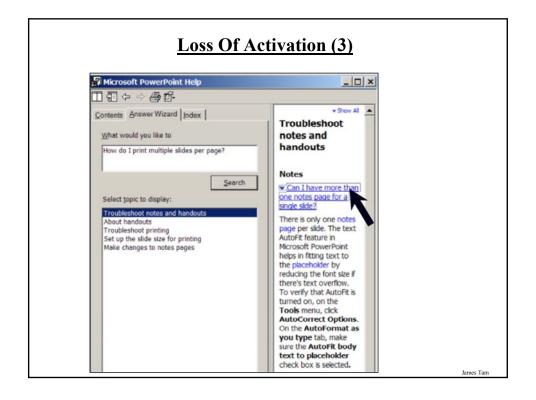
- Forgetting what the goal is while undergoing the sequence of actions
 - e.g., Start going to room and forget why you are going there
- "What the heck was I doing again?"
- Misordering a sequence

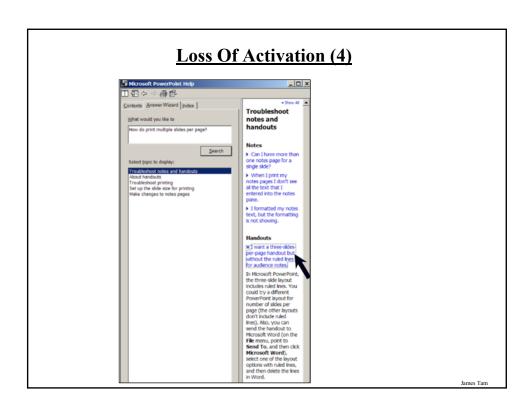
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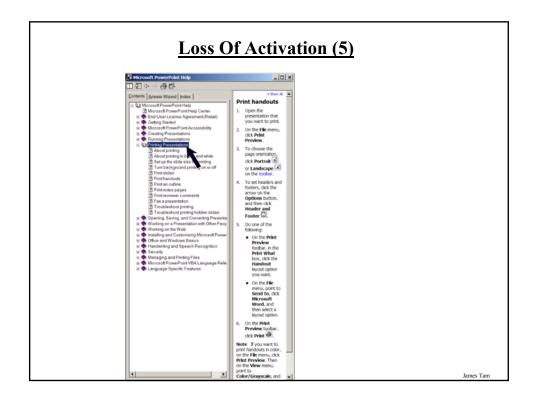
Loss Of Activation

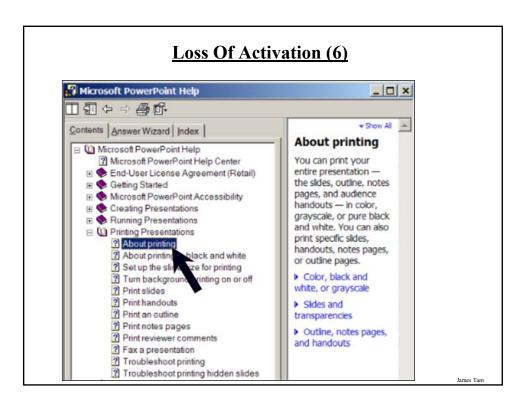


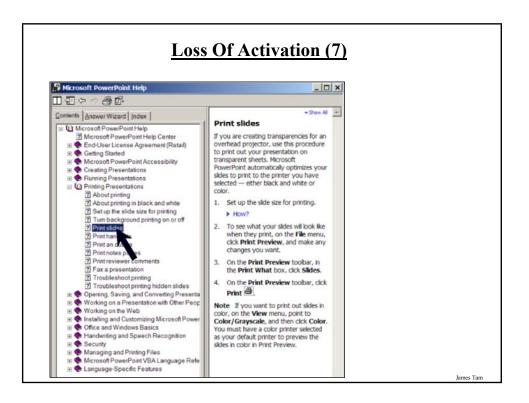


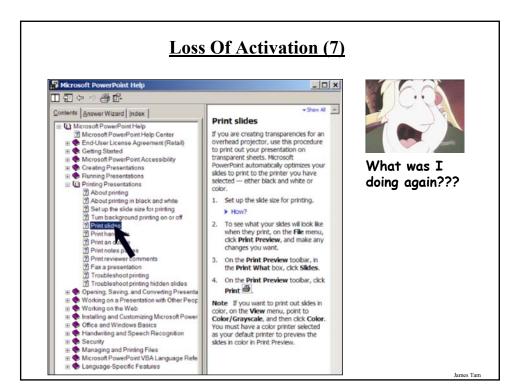












Types Of Slips: Mode Error

Mode errors

• People do actions in one mode thinking they are in another mode



Game is in multiplayer mode only (cannot load saved games)

Types Of Slips: Mode Error (2)

Mode errors

• People do actions in one mode thinking they are in another mode



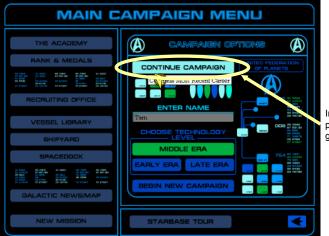
Game is single and multiplayer mode (cam start new campaigns or load existing games)

Iomas Tom

Types Of Slips: Mode Error (3)

Mode errors

• People do actions in one mode thinking they are in another mode



In this mode it is possible to load a game

Designing For Slips

General rules

- Prevent slips before they occur
- · Detect and correct slips when they do occur
- · User correction through feedback and undo

Examples

- Capture errors
 - One action captures another
 - Allow actions to be undone rather than asking for confirmations
- Description errors
 - Correct action on the wrong object
 - Make objects look physically distinctive and/or far apart
- · Loss of activation
 - Forgot goal
 - If system knows goal, make it explicit
 - If not, allow person to see path taken or shorten steps
- Mode errors
 - Mistake modes
 - Have as few modes as possible (preferably none)
 - Make modes highly visible

Generic System Responses For Errors

General idea: Forcing functions

- Prevent / mitigate continuation of wrongful action
 - e.g., range selection for dynamic queries

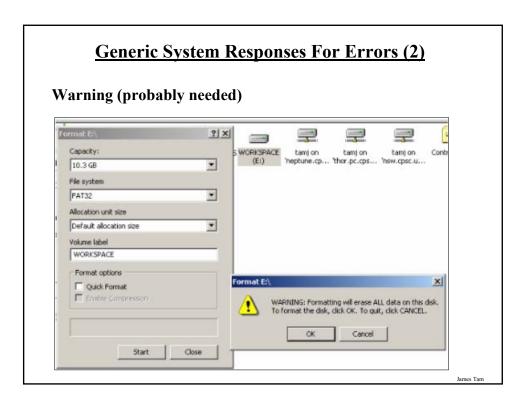
Gag

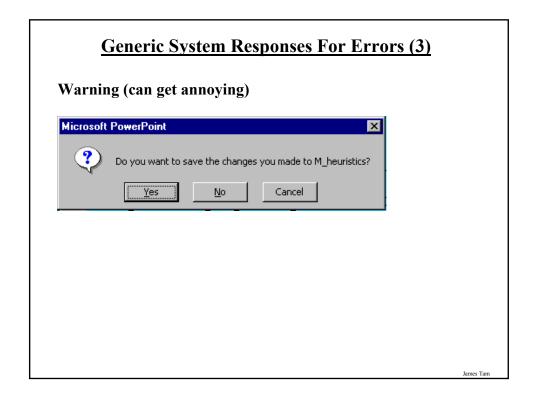
- Deals with errors by preventing the user from continuing
 - e.g., cannot get past login screen until correct password entered

Warn

- Warn people that an unusual situation is occurring
- Better than nothing but when overused, becomes an irritant
 - e.g., audible bell, alert box

James Tar





Generic System Responses For Errors (4)

Do nothing

- Illegal action just doesn't do anything
- User must infer what happened
 - e.g., enter letter into a numeric-only field (key clicks ignored)
 - e.g., put a file icon on top of another file icon (returns it to original position)

Self-correct

- System guesses legal action and does it instead but leads to a problem of trust
 - e.g., spelling checkers

Lets talk about it

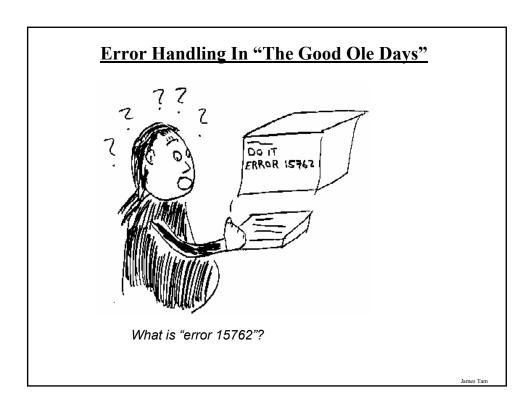
- System initiates dialog with user to come up with solution to the problem
 - e.g., compile error brings up offending line in source code

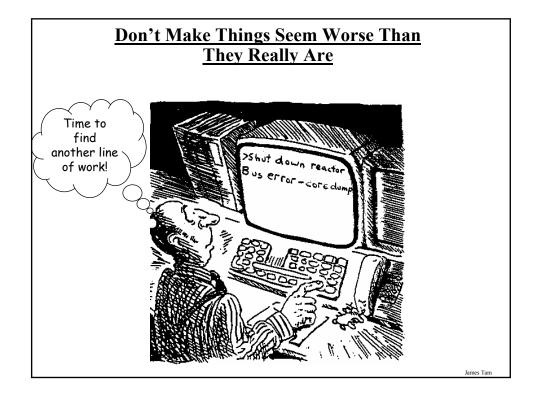
James Tan

Generic System Responses For Errors (5)

Teach me

- System asks user what the action was supposed to have meant
- Action then becomes a legal one





Rules Of Thumb For Error Messages

- 1. Understandable
- 2. Specific
- 3. Helpful

4. Polite and non-intimidating

- Don't make people feel stupid
 - Try again, bonehead!
 - Error 25
 - Cannot open this document
 - Cannot open "chapter 5" because the application "Microsoft Word" is not on your system
 - Cannot open "chapter 5" because the application "Microsoft Word" is not on your system. Open it with "Teachtext" instead?

James Tan

Examples Of Dealing With Errors In A Positive And Helpful Manner

Prevent errors

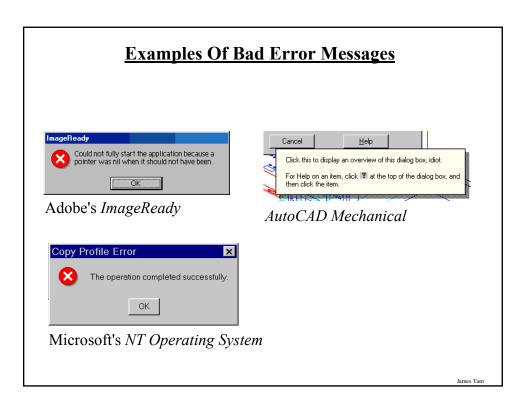
- Try to make errors impossible
- Modern widgets: only "legal commands" selected, or "legal data" entered

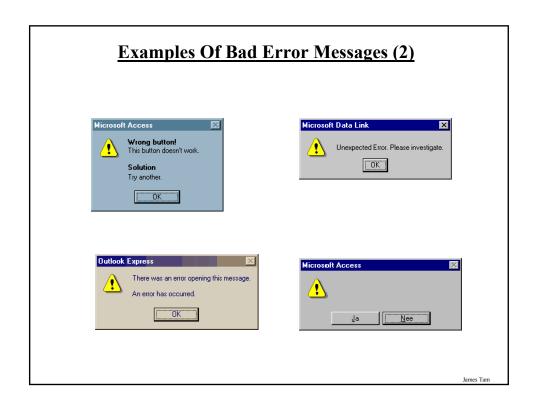




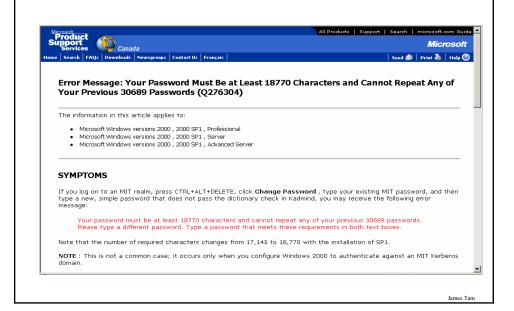
Provide reasonableness checks on input data

- On entering order for office supplies
 - 5000 pencils is an unusually large order. Do you really want to order that many?





Examples Of Bad Error Messages (3)



9. Provide Help

Help is not a replacement for bad design!

Simple systems:

• Walk up and use; minimal instructions

Most other systems:

- Feature rich
- Some users will want to become "experts" rather than "casual" users
- Intermediate users need reminding, plus a learning path (novice to advanced)



Documentation And How It's Used

Many users do not read manuals

- Prefer to spend their time pursuing their task
- Paper manuals unavailable in many businesses!
 - e.g. single copy locked away in system administrator's office

Typical usage scenarios:

- Usually used when users are in some kind of panic, need immediate help
 - Indicates need for online documentation, good search/lookup tools
 - Online help can be specific to current context
- Sometimes used for quick reference
 - Syntax of actions, possibilities...
 - List of shortcuts ...

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Types Of Help

Reference Manuals

Reminders

Context-sensitive help

- Tool tips
- What's this (Balloon help)

Wizards

Tips

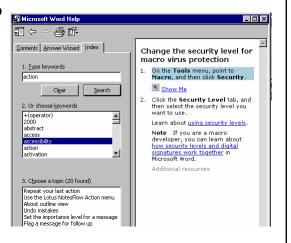
Reference Manuals

Traditional form of help

Detailed

Paper or online





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Traditional form of help

Detailed

Paper or online

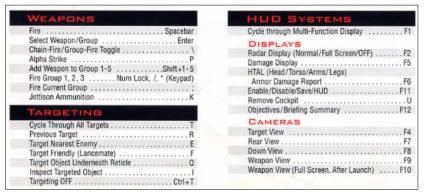




Reminders

Short reference cards

- Expert user who just wants to check facts
- Novice who wants to get overview of system's capabilities



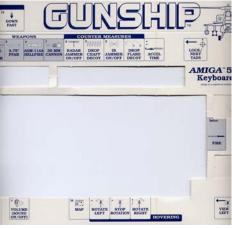
From "Mechwarrior 2: Mercenaries" © Microprose

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Reminders (2)

Keyboard templates

- Shortcuts/syntactic meanings of keys; recognition vs. recall; capabilities



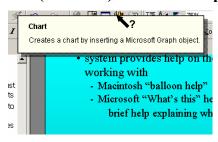
From "Gunship" © Microprose

Context-Sensitive Help

Tool tips

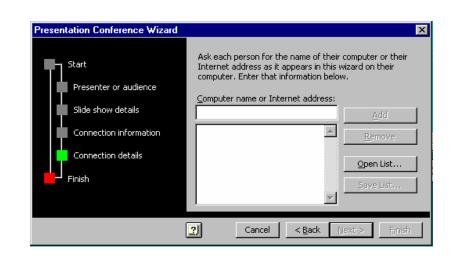


What's this (Windows) or Balloon help (Mac)



Iomas Ton

Wizards



Tips

Advanced features

Point out incorrect use



Change Awareness

- · What is change awareness
- · Why is it an important area of study
- · Issues in change awareness
- Future work

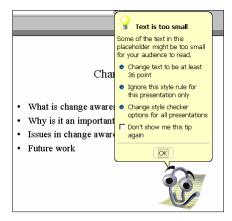


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Tips

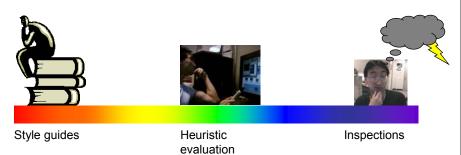
Advanced features

Point out incorrect use





It's a compromise between extensive style guides and intuition-based inspections



Iomas Tom

Conducting A Heuristic Evaluation (2)

Employ a small set of evaluators (3–5) examine interface using heuristics as a structure

Each person evaluates the system according to the heuristics individually $(\sim 1-2 \text{ hours})$

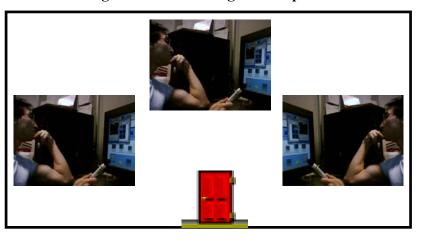






Conducting A Heuristic Evaluation (3)

After this bring the evaluators together to pool their results

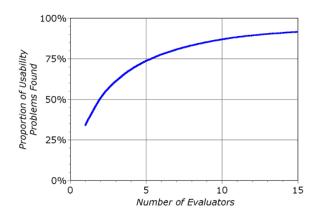


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Conducting A Heuristic Evaluation (4)

Benefits of group evaluations

- Single evaluator only catches ~35% of usability problems
- 5 evaluators catch ~75%



Statistics from "Usability Engineering" by Jakob Nielsen

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Heuristic Evaluations: Who Should/Could Conduct Them

- Interface experts
- •Software development team
- •End users
- Double experts

James Tan

Heuristic Evaluations: Types Of Systems To Evaluate

Low fidelity paper prototypes



Medium fidelity prototypes



Completed systems



Other Guidelines: Style Guides

Guidelines published by producers of graphical user interfaces (GUIs)

- Examples:
 - Open Software Foundation MOTIF
 - Open Look
 - MS Windows
 - Apple

Describes the "look and feel" of the GUI

- e.g. Open Look
 - Grouping items in the same menu:

Use white space between long groups of controls on menus or in short groups when screen real estate is not an issue

Good, but hard too follow

- GUI and widget specific
- Vast number of guidelines
- May miss fundamental design principles

James Tan

Example Pages From Motif Style Guide, Release 1.1

Message Dialogs

Description

MessageDialogs should be used to convey a message to the user. They must not interrupt the user's interaction with the application. They should include a message, and one of the following button arrangements.

OK

OK Help

OK Cancel

OK Cancel Help

Yes No

Yes No Help

Yes No Cancel

Yes No Cancel Help Cancel

Cancel Help

Retry Cancel

Retry Cancel Help

Related Information

For more information, see the reference pages for DialogBox, ErrorDialog, InformationDialog, QuestionDialog, WorkingDialog, and WarningDialog

Information Dialog

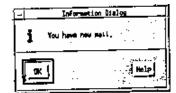
Description

An InformationDialog should be used to convey information the the user. It must not interrupt the user's interaction with the application. It should include an information symbol, a message, and one of the following button arrangements.

OK H-l-

OK Help

Illustration



Related Information

For more information, see the reference page for DialogBox

Other Guidelines: Widget-level "Guides"

Toolkit "hard-wires" guidelines

- Repertoire of widgets
- Look & feel of particular widgets
- Easier to use defaults then to re-invent the wheel!

Some toolkits

• Look & feel is programmer-settable or platform-dependent

Advantages:

- Easy to be consistent
- Widgets developed by experts (e.g., graphical designers)

Disadvantages

- Can be hacked around
- Interfaces "assembled" by non-interface designers can still be terrible

James Tan

You Now Know

Nine principles of design

- Simple and natural dialog
- Speak the user's language
- Minimize user's memory load
- Be consistent
- Provide feedback
- Provide clearly marked exits
- Provide shortcuts
- Deal with errors in a positive manner
- Provide help

James Tan

You Now Know (2)

Heuristic evaluation

• Principles can be used to systematically inspect the interface for usability problems

Style guides are mostly platform-dependant design principles

Widget-level guidelines are built into the widgets themselves

James Tan