

# Handling Errors, Help & Documentation

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## Agenda

- Handling errors
  - Error types
  - Slip types
  - Error prevention guidelines
  - Error recovery guidelines
- Help & documentation
  - Guidelines
  - Types of doc/help
  - Presentation issues
  - Doc organization



## Errors

- Three considerations:
  - Avoiding and preventing
  - Identifying and understanding
  - Handling and recovering



## Why errors are important

### Errors are unavoidable

To err is human

Making mistakes is part of learning

### Designer's responsibility

Understand why errors occur

Minimize likelihood

Allow for recognition of error and graceful recovery  
(forward or backward)



## User-Computer Dialog

- Three phases
  - Read-scan phase -- Perceptual errors
  - Think phase -- Cognitive errors
  - Respond phase -- Motor errors



## Perceptual Errors

- Result from insufficient or poor perceptual cues
  - Examples
    - Display of objects that are visually similar
    - Invisible or poorly expressed states
    - Failure to capture user's attention
    - Lack of perceivable feedback



## Cognitive Errors

- Caused by taxing the memory and problem solving capabilities
  - Examples
    - Tax recall memory
    - Lack of or poor mnemonic aids
    - Inconsistency
    - Lack of context or status info
      - e.g., where came from in a menu
    - Mental calculations and translations



## Motor Errors

- Taxing the eye-hand coordination and motor skills
  - Examples
    - Awkward motor movements
    - Highly similar motor sequences
      - e.g., double click, click
    - Pressure for speed
    - Require a high degree of hand-eye coordination
    - Requiring special types of motor skills (type)



## Example Studies

- 170 experienced UNIX users over 9 days
  - Individual commands had error rates of 3-50%
- 300 security system users over 20 months
  - 12,117 error messages
  - Most common 11 errors -> 65%
  - 2517 involved repeated errors (with no non-errors in between) within 10 minutes
    - → Bad error recovery/help

Kraut et al, CHI '83

Mosteller & Ballas, *Human Factors* '89



## Slips

- Automatic (subconscious) error that occurs without deliberation
- Examples?



## Types of Slips

- 1. Capture error - Continue frequently done activity instead of intended one (similar starts)
  - Type “animation” instead of animate
  - Confirm deletion of file instead of cancel
- 2. Description error - Intended action has much in common with others possible (usually when distracted, close proximity)
  - ctrl key & caps lock key / Sun & Mac



## Types of Slips

- 3. Data driven error - Triggered by arrival of sensory info which intrudes into normal action
  - Call to give someone a number, dial that number instead
- 4. Associative activation - Internal thoughts and associations trigger action
  - Phone rings, yell “come in”



## Types of Slips

- 5. Loss of activation - Forgetting goal in middle of sequence of actions
  - Start going into room, then forget why you're going there
- 6. Mode errors - Do action in one mode thinking you're in another
  - Delete file, but you're in wrong directory



## Error Prevention Guidelines (1)

- Eliminate modes or provide visible cues for modes
- Use good coding techniques (color, style)
- Maximize recognition, minimize recall
- Design non-similar motor sequences or commands
- Minimize need for typing



## Error Prevention Guidelines (2)

- Test and monitor for errors and engineer them out
- Allow reconsideration of action by user (e.g., removing file from trash)



## Error Recovery Guidelines (1)

- Provide appropriate type of response
  - Gag - Prevent user from continuing
    - Erroneous login
  - Warn - Warn user an unusual situation is occurring
    - Bell or alert box
  - Nothing - Just don't do anything (Careful, user must determine problem)
    - Mac: move file to bad place



## Error Recovery Guidelines (2)

- Responses (continued)
  - Self-correct - Guess correct action & do it
    - Spell-check correction
  - Dialog - System opens dialog with user
    - Go into debugger on run-time crash
- Query - Ask user what should've been done, then allow error action as legal one
  - Command language naming error



## Error Recovery Guidelines (3)

- Provide undo function
- Provide cancel function from operations in progress
- Require confirmation for drastic, destructive commands
- Provide reasonableness checks on input data
  - Did you really mean to order 5000?



## Error Recovery Guidelines (4)

- Return cursor to error field, allow fix
- Provide some intelligence
  - Guess what they wanted to do
- Provide quick access to context-sensitive help



## Error Message - What to Say

- Error: Error code -37
- Description: Disk full
- Prescription: Disk full; recover disk space
- Prescription + aid: Disk full; recover space by deleting files or defragmenting
- Prescription + offer: Disk full; proceed with disk defragmentation? Otherwise delete files



## Error Message Wording - Vocabulary

- Problem with previous example - some users will not know what defragmentation means!!
- Vocabulary
  - User-oriented
  - Defined in advance for commonality throughout all messages (in style guide)
- Alternatives to “defragmentation” ?



## Error Message Wording - Tone

- Sorry, command not recognized
- Command not recognized :-(
- Command not recognized
- Command not recognized!!



## Or Even Worse

- Illegal command
- Illegal command!
- ILLEGAL COMMAND !@#&



- **ILLEGAL COMMAND!**



- Which may suggest to some users ...



## Help & Documentation

- It's in the manual...



## Customer Support

DILBERT / SCOTT ADAMS, scottadams@aol.com



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## User Support

- Help
  - Problem-oriented and specific
- Documentation
  - System-oriented and general



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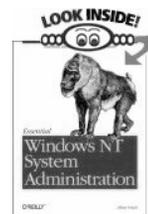
## Help & Documentation

- Never a replacement for bad design, but essential
- Simple systems may not use/require any
  - User walks up and uses it
  - Name some
- Most other systems with rich features require help



## Documentation

- Many users don't read manuals
  - Boring, no goal
  - Just dive in and start working
- Often used in panic mode, when user needs immediate help
  - Manuals probably locked away somewhere
  - Points to need for on-line help with search
- Sometimes want quick ref - emacs card



## User Support Requirements (1)

- Availability
  - Should be available any time the user is operating the system
- Accuracy & Completeness
  - Should be accurate (tricky with changing versions) and should cover all aspects of application



## User Support Requirements (2)

- Consistency
  - Across different sections, between on-line and paper documentation, in terminology, content and style
- Robustness
  - Should be predictable and free of errors



## User Support Requirements (3)

- Flexibility
  - Appropriate for novices through experts, maybe by having expandable sections of details
- Unobtrusiveness
  - Shouldn't distract from or interfere with normal work flow



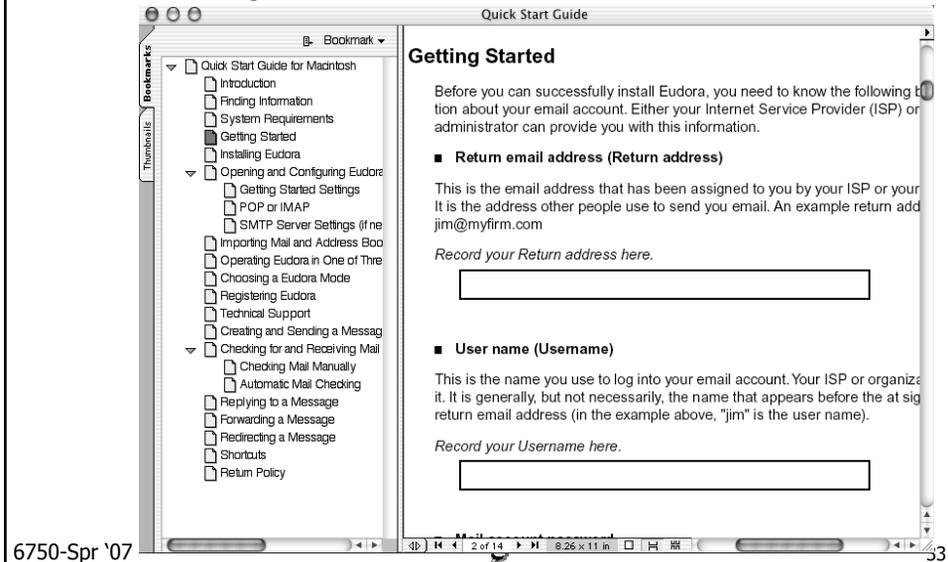
## Types of Doc/Help

- 1. Tutorial
  - For start-up
  - Gets user going
  - Convey conceptual model
  - Communicate essential items
  - Sometimes see on-line tour or demo



# Types of Doc/Help

## Quick start guide as a tutorial



## Tutorial Manual - Outline

### 1. Introduction

- Assumed background of reader
  - Ref on where to get it
- General capabilities
- Key concepts - model, metaphor

### 2. Starter kit of tasks and how to accomplish

- For each task - examples, screen shots
- Introduce additional elements of conceptual model only as needed
- How to deal with *common* errors / exceptions
- Have plenty of examples, complete sample sessions



## Tutorial Manual - Outline

### 3. More tasks

- Introduce more commands as needed by tasks
- More sophisticated uses of earlier commands
- Changing defaults
- Etc
- Etc

### N. Index

- § Organized by terms, concepts, tasks, commands



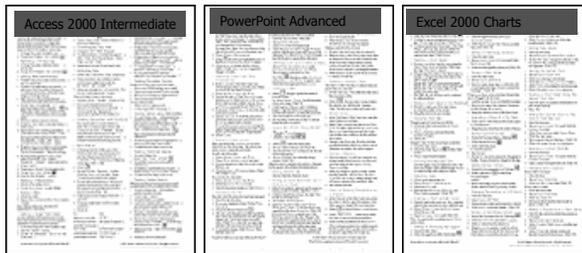
## On-line Tutorial

- Work through simple examples, provide a feel for application



# Types of Doc/Help

- 2. Quick reference/review
  - Reminder or short reference
  - Often for syntax
  - Can be recall aid for expert
  - Can allow novice to see what's available



# Example

Microsoft  
**QUICK SOURCE** Internet Explorer 6.0

### Getting Started

**The Internet Explorer Window**

- **Title Bar** – displays the name of the current page and the name of the program.
- **Menu Bar** – contains all of the menus for use with Internet Explorer 6.0.
- **Standard Buttons Bar** – contains shortcut buttons for standard Internet Explorer tools. Use these tool buttons to navigate, search, and work with sites.
- **Address Bar** – displays the current location's address.
- **Links Bar** – contains shortcuts to popular sites.
- **Explorer Bar** – displays various Explorer tools, such as tools for searching, accessing feeds, and viewing your favorite pages, history, and system folders.
- **Explorer Window** – displays the contents of the current page.
- **Status Bar** – displays the address associated with a selected link when you place your mouse pointer over the link. It also displays the status of a page as it loads, indicating how much of the page has been received.

**Opening a Site**

1. Select **Open** from the **File** menu, or press **Ctrl + O**.
2. Type an Internet address in the **Open** box. To select from a list of addresses, click the arrow button on the **Open** box and select an address from the pop-up menu.
3. Click the **OK** button.

*Note:* To open a site using the **Address bar**, click **enter** in the **Address bar**, enter an Internet address, and press the **Enter** key.

**Using AutoComplete**

As you enter an address in the **Address bar**, Internet Explorer will suggest possible matches. If a suggestion in the list matches the address you want to open, click the address. To ignore the suggested addresses, just keep typing.

**Opening a New Window**

When you open a new Internet Explorer window, you can open more than one site at a time. Select **New** from the **File** menu and select **Window** from the resulting menu, or press **Ctrl + N**.

**Changing Your Home Page**

A home page is the page that appears when you launch Internet Explorer.

1. Open the page that you want to designate as your home page.
2. Select **Internet Options** from the **Tools** menu.
3. Click the **General** tab.
4. In the **Home page** section, click the **Use Current** button.
5. Click the **OK** button.

**Using Links**

Links are the underlined and/or colored words, phrases, or graphics that have Internet page addresses embedded in them. When the mouse pointer is on a link, the arrow pointer turns into a hand . When you click a link, you are telling Internet Explorer that you want to view the Internet page associated with that link.

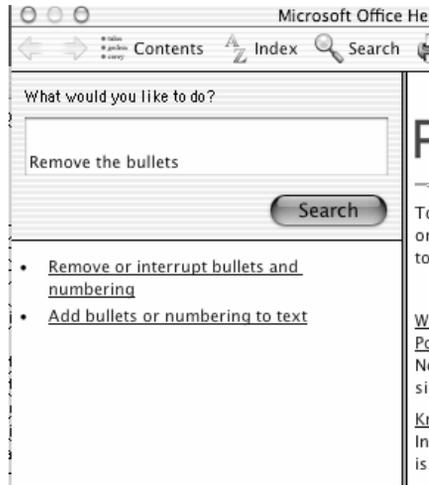
**Using the Standard Buttons**

- Back** – opens a previously viewed page. Click the down arrow on the button to view a list of previously viewed pages.
- Forward** – moves forward through pages that have been viewed using the **Back** button. Click the down arrow on the **Forward** button to view a list of the pages.
- Stop** – stops the current page from loading.
- Refresh** – reloads the current page.
- Home** – opens your home page.
- Search** – opens the Search pane, where you can search for information.
- Favorites** – opens the Favorites pane, where you can view and access your favorite pages.
- Media** – opens the Media pane, where you can access and download media.
- History** – opens the History pane, where you can view and access recently viewed sites.
- Mail** – displays a list of options for reading and sending mail using Outlook, Outlook Express, or your default e-mail program.
- Print** – prints the current page.
- Edit** – opens the page in an HTML editor program (e.g., Microsoft FrontPage), or other appropriate program, such as Microsoft Word.
- Discuss** – enables you to chat with other users on a discussion server.



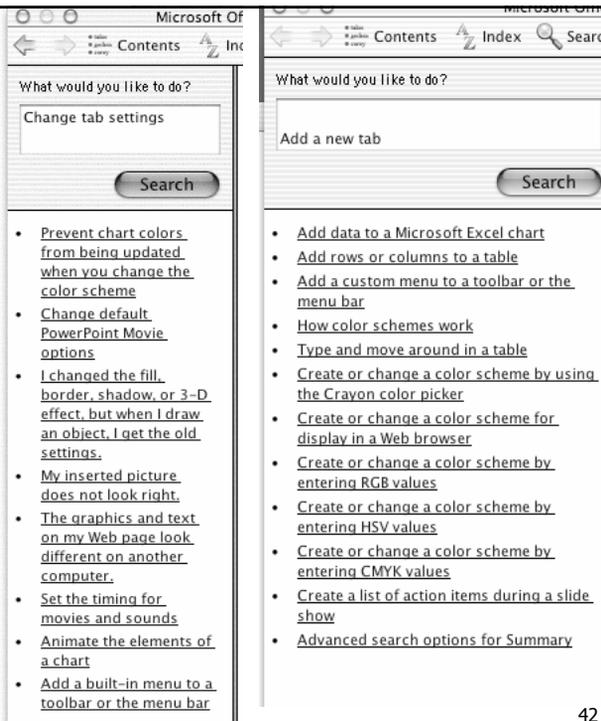
## Types of Doc/Help

- 4. Searchable  
Sometimes it works....



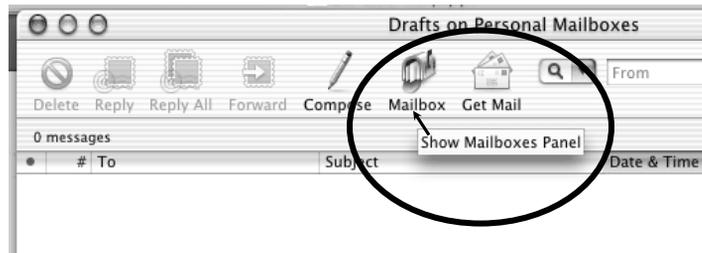
## Searchable

- And sometimes, it doesn't....



## Types of Doc/Help

- 5. Context-sensitive (task-specific) help
  - System provides help on current situation
  - Macintosh balloon help (old), ToolTips, for example
  - Other examples?



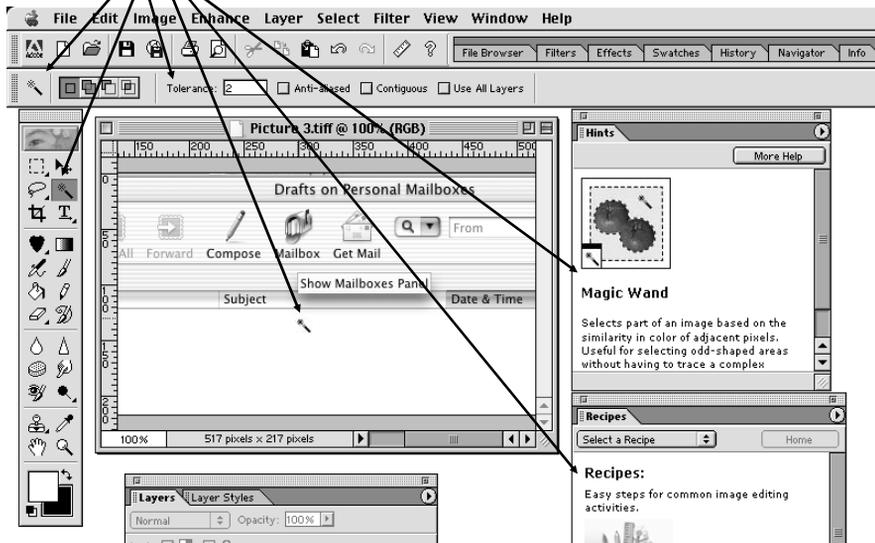
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## Types of Doc/Help

Context Sensitive Help e.g. Photoshop



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## Medium

- Paper versus monitor
- Studies show that people are 15-30% slower reading and comprehending text from a display as compared to paper



## Monitor

- Causes for slow-down
  - Poor fonts (`monospace`, bad kerning "VA", bad spacing, ...)
  - Low contrast of letters & background
  - Emitted vs. reflected light (curved tube)
  - Small display -> page turning
  - Distance, placement of monitor
  - Layout and formatting problems
  - Reduced hand and body motion



## Presentation Issues

- Integrate with system, don't "add on"
- 1. How is help requested?
  - Command, button, function, separate application
  - Advantages, disadvantages?
- 2. How is help displayed?
  - Separate window, whole screen, part of screen, on top of application, pop-up box, command line, highlighted button, light bulb..
  - Largely depends on what type of help it is



## Presentation Issues

- 3. Effective presentation of help
  - Design it like any other part of UI: language, terminology, jargon, etc.
  - Use active voice
    - "To close a window, place the mouse cursor in the box at the upper right corner (with the X) and click the mouse button."
- 4. Implementation issues
  - Fast response time is important
  - How is help stored? File, database, ...?



## Adaptive Help

- Tailor help level and style to the particular user
- Usually requires a system to maintain a *user model*



## Help Levels

- 1. Designer model
  - System designer has model of typical user and builds interface with this in mind
- 2. Adaptable help
  - User can edit their own model, for example, .profile on UNIX
- 3. Adaptive help
  - System maintains a user model and can change it on the fly



## User Model

- How is user model constructed and maintained?
  - 1. Quantification - Numeric levels of use
  - 2. Stereotype
    - Novice, intermediate, expert
    - Utilize command use and errors to categorize
  - 3. Overlay model
    - Build expert user profile with optimal behavior
    - Compare to what user is currently doing



## Adaptive Help Issues

- Initiative & control
  - Does user feel that control was taken away by system?
  - “You’re not performing efficiently in this task”
- Use
  - Is all this work actually useful?
- Scope
  - To what aspect of system or of help does it apply?



## Documentation – Worth It?

- Studies have taken documentation and improved it
  - People did perform better with the improved documentation
  
- -> Effort here is worthwhile



## Recommendations

- |                               |                                                           |
|-------------------------------|-----------------------------------------------------------|
| • OK                          | • Better                                                  |
| – All details of each command | – Subsets of concepts                                     |
| – BNF or formal notation      | – Lots of examples                                        |
| – Terse, technical prose      | – Readable explanations with a minimum of technical terms |



## Doc Organization

- State educational objectives
- Present concepts in logical sequence, increasing order of difficulty
- Avoid forward references
- Make sections have roughly equal amounts of material
- Have plenty of examples, complete sample sessions



## Doc Organization

- Each concept section:
  - Explain reason for concept
  - Describe concept in task-domain semantic terms
  - Show computer-related semantic concepts
  - Offer syntax
- Table of contents and index are important
- Keep reading level simple



## Reading Level

- Study on doc at 5th, 10th, 15th grade reading levels among low, mid, high reading level people
- Reading level of person affected performance, but not reading level of text
- People liked 5th grade text best

Roemer & Chapanis, CHI '82



## Improving Doc

- Run through think-aloud sessions
- Use on-line example tutorials
- Try to predict common states and problems
- Anticipate errors
- Develop manuals early and pilot test
- Iteratively refine



## Human Characteristics

- Don't anthropomorphize
  - “The computer will calculate an answer after you respond”
    - Gives user inaccurate impression
  - “You can get the solution by pressing F1”
    - Better to put user in control



## Terminology

- |                                                                                                                                                                                               |                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Avoid<ul style="list-style-type: none"><li>– know, think, understand, have memory</li><li>– ask, tell, speak to, communicate with</li></ul></li></ul> | <ul style="list-style-type: none"><li>• Better<ul style="list-style-type: none"><li>– process, print, compute, sort, store, search, retrieve</li><li>– use, direct, operate, program, control</li></ul></li></ul> |
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## Upcoming

- Prototyping and UI Software
- Exam
- Poster session

