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Intelligent User Support in Graphical User Interfaces:

- 1. InCome: A System to Navigate through
Interactions and Plans**

Thomas Fehrle, Markus A. Thies

- 2. Plan-Based Graphical Help in Object-
Oriented User Interfaces**

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InCome : A System to Navigate through Interactions and Plans

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Abstract

This paper presents a frontend to an intelligent help system based on plans called InCome (**I**nteraction **C**ontrol **M**anager). It visualizes user actions previously executed in a specific application as a graph structure and enables the user to navigate through this structure. A higher level of abstraction on performed user actions shows the dialog history, the interaction context and reachable goals. Finally, the user is able to act on the application via InCome by performing undo mechanisms as well as specifying user goals inferred already by the help system.

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1 Introduction

Some effort in the research area of intelligent user support has led to plan-based help systems (cf. [6], [7], [1]), that deduce reachable user goals from interactions performed by a user within an application. The fundamental knowledge of such intelligent help systems is represented by plans describing sequences of actions, that have to be executed to reach a specific goal. Based on that technique intelligent help systems can answer user questions concerning the dialog context as well as suggest ways to fulfil a goal. Currently implemented plan-based help systems support the user when interacting with command oriented operating systems. InCome expands the scope of such help systems to window oriented interaction styles and Direct Manipulation Interfaces (DMI). Many applications offer a comfortable interface but show a deep complexity of implemented objects and actions without offering a suitable user assistance. To provide a sophisticated user support (to inform the user how to proceed in the actual task or how to resume a suspended dialog while working on different tasks in parallel) new approaches are required. To support a user in using a DMI, intelligent help systems must have knowledge about actions, plans and goals as well as the actual state of the interaction context between the user and the application. A sequence of actions must be deducible to reach intended goals of the user. Help information should be easily accessible without changing interaction style.

2 Concepts of InCome

InCome¹ provides a graphical visualization of the actual dialog context, the dialog history and possible future interactions. InCome gives the user a quick and helpful reminder on the system state to resume suspended applications. It supports the user in leaving system states unfamiliar to him and in exploring actions which would be executable next. InCome meets the following demands (cf. [5]):

- Adequate visualization of user interactions.
- Display of different levels of abstraction selected by user interactions.
- Graphical navigation services.
- Visualization of possible future interactions.
- Semantic undo/redo capabilities.
- Display of embedded, overlapped and interrupted plans.

An application system using InCome consists of at least the logical part of the application, a presentation manager for the communication between user and application, a plan recognizer/generator knowing predefined hierarchical plans and InCome itself (cf. fig. 1, InCome modules are shaded).

¹InCome is developed as part of the joint project PLUS (Plan-based User Support) between the IBM Laboratory Böblingen, the IBM Deutschland GmbH and the DFKI

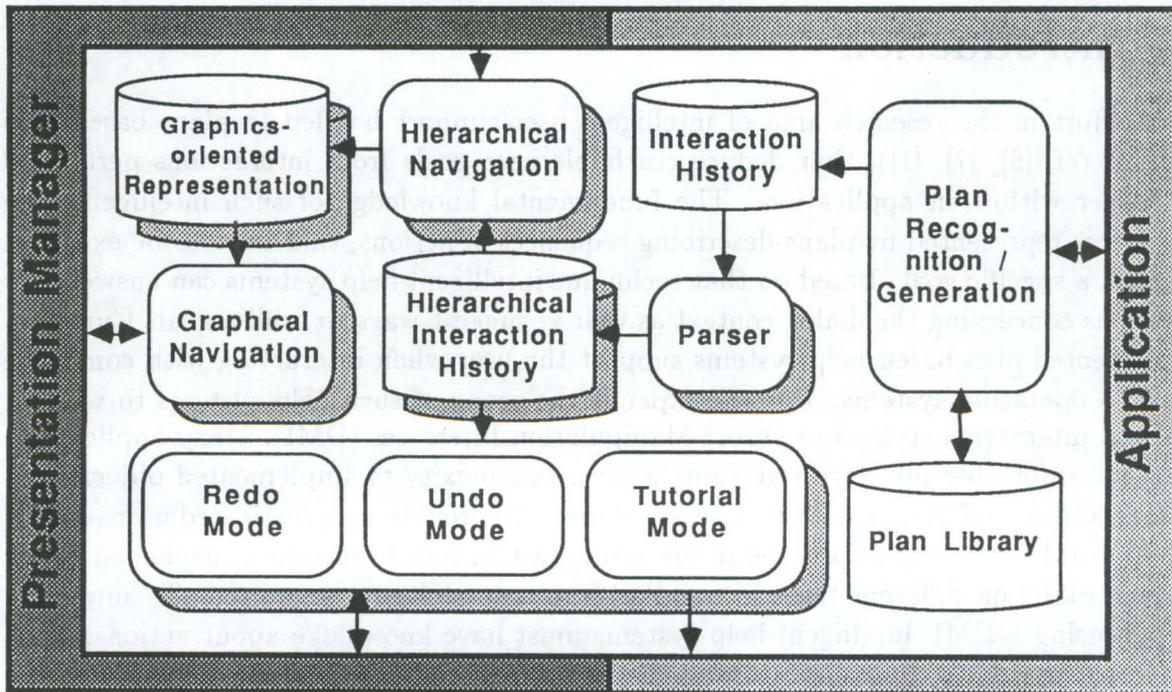


Figure 1: Architecture of InCome

3 User Interface of InCome

While the user interacts with the application the plan recognizer tries to map these actions to plans and makes assumptions about goals intended by the user. These assumptions are sent to InCome which builds up an internal representation of them and displays it as a graph structure on the screen. The instances of the two object classes plans and actions are visualized as nodes. To reflect the sequence of actions in a plan the objects belonging to the same plan are connected with arcs. A goal is visualized by a goal-banner. The displayed interaction structure involves different levels of the plan hierarchy. So the user can easily recognize which actions lead to a specific goal.

The overall structure resembles a directed graph from top to bottom to model the chronological order of the performed interactions. Additionally different colors are used for the nodes to distinguish interactions in the past and in the future.

The positioning of the different objects on the screen is performed by an incremental deterministic layout algorithm. This guarantees that the relative positions of the already visualized performed interactions are not influenced by adding new interactions to the graphical representation. This minimizes the cognitive stress of the user to recognize visualized interaction structures.

In DMI there is a high degree of plan interactions such as *plan-overlapping*, *plan-interruption*, and *plan-embedding*. For example, plan-embedding occurs in a plan hierarchy where frequently used sequences of actions are extracted and combined to a plan which can be later used as a subplan in higher-level plans, as for example when performing generic operations, such as choosing a menu selection or selecting a graphical object with the mouse.

InCome runs in its own window. The presented nodes are selectable via mouse clicks

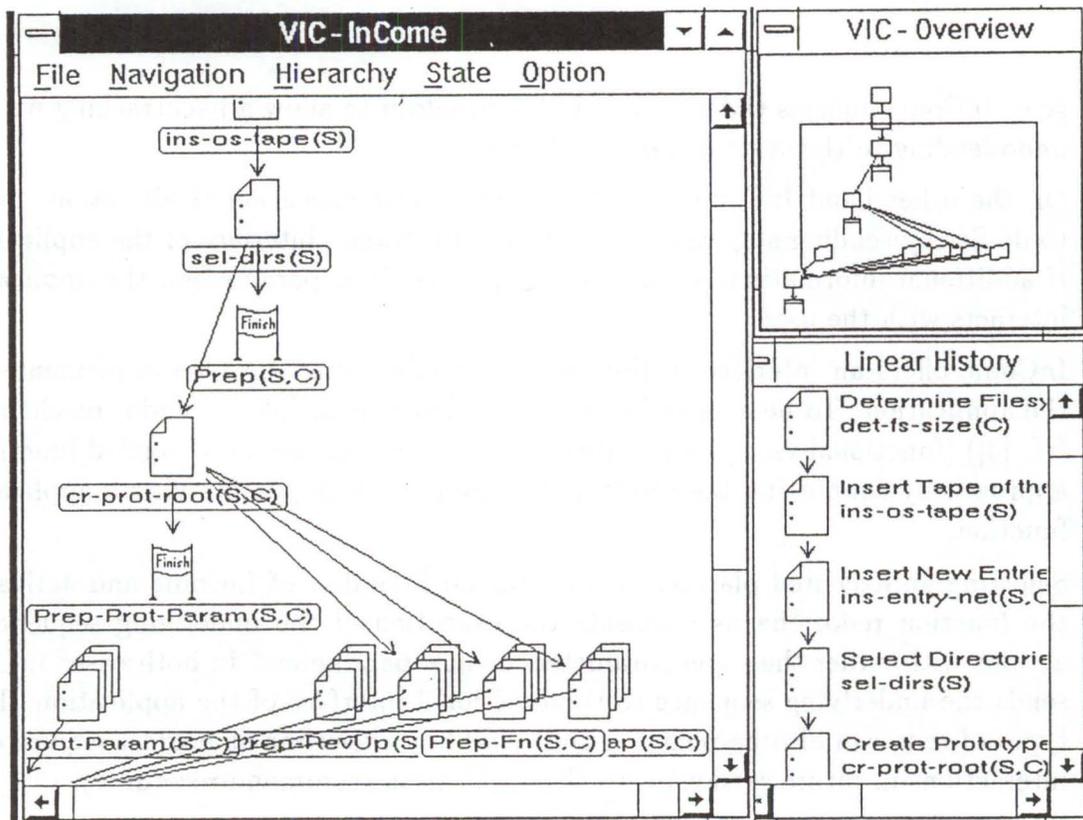


Figure 2: Windows of InCome

and actions are offered in pulldown menus following the interaction style standard implemented by the user interface management system. User actions possible in InCome are divided into three categories:

- Graphical navigation includes actions like overview, scrolling and searching specific nodes. The overview window contains the whole visualized interaction structure by performing operations to display it on a reduced scale. It supports several navigation aids (e.g., indirect and direct positioning of the standard window of InCome).
- Hierarchical navigation supports the user in viewing different levels of plans. A plan can be a subplan of a higher level plan. Plans can be opened to see the underlying sequences of actions or subplans. On the other hand, actions that are associated to the same goal can be combined and represented as one plan. In addition, InCome provides the ability to focus on plans comparable to a fish-eye view. Every object out of interest is abstracted to such a level that the focused plans are not effected.
- InCome allows the user to act on the application remotely by offering him a tutorial mode and access to undo-mechanisms and redo-mechanisms. In general, the user expresses reachable goals to be guided to by InCome. If the user selects a reachable goal and activates the tutorial mode, InCome requests a sequence of actions from the plan generator and visualizes this sequence in a to-do-list shown to the user in a separate window. Then InCome supervises the executed user actions by marking performed actions in the to-do-list and showing the next steps necessary to reach the selected goal. If the user has performed an action that compromises the selected

goal, InCome informs the user about this situation to allow a backtracking with an undo leading to the system state valid before.

On the other hand InCome provides an automatic execution of all actions in the to-do-list by sending stepwise actions to the functional interface of the application. If additional information is required, e.g., unspecified parameters, the application interacts with the user.

InCome offers an interface to the undo-mechanism that must be implemented by the application. To be able to handle two different principles of undo- mechanisms (cf. [3]) (functional vs. system-state oriented), InCome uses an extended functional approach by supporting the resetting to explicit freezing points via an application function.

Selecting an executed plan out of the standard window of InCome and activating the function redo, the user repeats the execution of the underlying sequence of actions with either the same parameters or new parameters. In both cases InCome sends the underlying sequence to the functional interface of the application. Both types of redo can also be recorded and reused by executing analogical sequences of interactions in future sessions with the application (command recording).

4 System Architecture

The system architecture of InCome is splitted into three components interacting with the user and one component building up the internal representation of the interaction history (cf. fig. 1). The parser generates the hierarchical interaction history from a syntactically formalized plan-based interaction history coming either from the plan recognizer/generator or from the interaction history. The hierarchical navigation module produces the graphics-oriented representation of the interaction history which is afterwards interpreted by the graphical navigation module to generate the several displays like the standard window, the overview window and the linear dialog history. This module also implements the graphical navigation aids.

Activating the tutorial mode causes the appropriate module either to extract a valid sequence of actions from the hierarchical interaction history or to request it from the plan recognizer/generator. The redo and undo modes generate the appropriate sequences of actions and send them to the functional interface of the application. InCome is a separate application and is implemented in Smalltalk/V PM running on an IBM PS/2 under OS/2.

5 Conclusions

InCome provides the user a quick and helpful reminder on the system state to resume suspended applications. It assists the user in leaving system states unfamiliar to him. The combination of undo- and redo-mechanisms on a high level of interaction abstraction supports him in exploring alternative actions which would have been executable next. The combination of the undo- / redo-mechanisms with the high level visualization of interactions gives the user the opportunity to perform an undo-redo on a semantic level

(semantic undo / semantic redo) because he can activate it on plans rather than on single actions.

The presented interaction control manager InCome can be integrated in a user interface design environment like UIDE (cf. [2], [4]) in such a way, that on user demand the tutorial mode of InCome presents an animation of the necessary user steps to reach the specified user goal.

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Plan-Based Graphical Help in Object-Oriented User Interfaces

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Abstract

This paper describes the system PLUS, a plan-based help system for applications offering an object-oriented user interface. Our plan recognition process is based on a predefined static hierarchical plan base, which is modeled using a goal plan language. This language is designed to especially cope with the problems arising when plan recognition is performed in a graphical user interface environment whose interaction is based on a user-directed dialog by means of direct manipulation — so-called Direct Manipulation User Interfaces. The plan hierarchy is entered using the interactive graphics-oriented plan editor PlanEdit⁺. The plan recognition module PlanRecognizer⁺ builds a dynamic plan base by mapping user actions to plans stored in the static plan base. The dynamic plan base contains hypotheses about tasks the user is pursuing at the moment. These plan hypotheses serve as a basis to offer various kinds of assistance to the user. A central component of our graphical help is the module InCome⁺. InCome⁺ visualizes user actions previously executed in an application as a graph structure and enables the user to navigate through this structure. A higher level of abstraction on performed actions shows the dialog history, the interaction context, and reachable goals. InCome⁺ offers special features like task-oriented undo und redo facilities and a context-sensitive tutor. A substantial extension of the graphical user assistance is the integration of animated help within PLUS. Animation sequences are generated in the context of the tasks the user is currently working on.

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1 Introduction

The overall objective of PLUS is the design and the implementation of a plan-based help system. Rather than doing basic research, the state-of-the-art methods of several fields in Artificial Intelligence like *Knowledge Representation* and *Plan-based Systems* should be incorporated. In the context of plan-based help systems, a plan is a sequence of actions that have to be executed to complete a given task, thereby achieving a specific goal. Unlike known help systems that were mostly developed for command-based interfaces (see, e.g., [Finin 83], [Fischer et al. 85], [Wilensky et al. 88], [Wahlster et al. 90], [Bauer et al. 91]), PLUS is designed to cope with applications that offer graphical user interfaces, whose main interaction principle is based on a user-directed dialog by means of direct manipulation (cf. [Shneiderman 83], [Shneiderman 87]) — so-called **Direct Manipulation User Interfaces (DMI)**.

A special feature of such a DMI-environment is the flexibility of the user in performing tasks within an application. There usually exists neither a definite action sequence for the execution of a plan nor a fixed number of actions required for accomplishing a given task. Moreover, in a DMI-environment it is possible to work on different tasks in parallel and to switch between them arbitrarily. For an expert user, this flexibility makes it easier and more comfortable to handle such a system. An unexperienced user, however, may easily get confused and encounter difficulties when working with the application. In such a situation, he may want to ask a human expert for help. The help system that is developed within PLUS, should replace such an expert. In contrast to manuals or static online help facilities usually supplied with an application, the PLUS help system is able to deal with the user's problems in a context-dependent manner by giving him advice related to the tasks he is performing at the moment.

In order to meet these demands, the following help strategies are designed within PLUS:

- **Passive help:**
The user explicitly requests help.
Context sensitive help information is generated.
- **Active help:**
The user gets help without explicitly requesting it.
E.g., the system offers the user an optimized interaction sequence to reach a specific goal.
- **Cooperative help:**
The user gets help when he runs into an error condition.
The system suggests possible corrections or recommends alternative solutions to the user.
- **Implicit help:**
The system adapts itself by, e.g.,
 - changing the screen layout,
 - focusing the user's attention,
 - setting defaults.

The PLUS prototype has been developed using a Smalltalk system. The design of the prototype follows progressive methods in application development and concepts of object-oriented software development (cf. [Wisskirchen 90], [Booch 91]).

2 The PLUS System

The main module of a plan-based help system is a plan recognizer. While the user interacts with the application, the plan recognizer tries to map the performed actions to plans, thereby making assumptions about the goals intended by the user. These plan hypotheses form the basis for offering various kinds of help to the user.

There exist two different approaches for plan-based systems. On the one hand, there are systems that generate plans during run-time using a *plan generation system* (see, e.g., [Bauer et al. 91]). This approach is also called plan recognition from *first principles*. On the other hand, there are systems that use a predefined plan-base as an input for the plan recognition component (plan recognition from *second principles*). The plan recognizer used within PLUS is based upon the second approach.

Coping with different DMI-events, we use a two-level plan recognition approach. With this two-level approach we are able to process the low-level events without stressing the actual plan recognition process.

The first level processes low-level events like mouse-clicks and keystrokes. Upon the first level, we protocol the user's favourite interaction styles — does he mostly use the mouse or does he prefer 'short-paths' — and build up a simple user model to reflect the user's preferences (user modelling see, e.g., [Kobsa & Wahlster 89] [Rich 89]).

First, the user model can be employed for adapting help information to the user's habit by considering his preferred interaction styles, and second, it allows to detect alternative interaction principles that are unknown to the user. Moreover, while generating help sequences, the first level of the plan recognition is used to determine the most effective interaction technique to perform a specific action.

The results of this first plan recognition level are application-specific actions performed by the user by, e.g., selecting pulldown items. These actions are recorded within a *Dialog History* that serves as an input for the second level plan recognition process, realized through the module *PlanRecognizer⁺*.

Using a *spreading activation* algorithm, *PlanRecognizer⁺* tries to map actions stored in the dialog history to plans in the predefined hierarchical plan base. We use a hierarchical plan base to offer a user-adequate assistance on a suitable abstraction level, and in order to guarantee an efficient plan recognition process. Logically coherent action sequences may be part of various plans. Therefore, it is obvious to combine them to an independent plan, and to define this plan as a subplan in the corresponding, more abstract plans. Thereby, we obtain a plan hierarchy with several layers. This so-called *static plan base* is interactively entered using the graphics-oriented plan editor *PlanEdit⁺* (cf. section 3).

The spreading activation algorithm builds up the so-called *dynamic plan base* at run-time. The dynamic plan base contains hypotheses about plans and goals the user is pursuing at the moment. Together with a knowledge base containing common help strategies extended by rules and facts about generic interface concepts, these hypotheses serve as a basis for the help component and for *InCome⁺* (cf. figure 1).

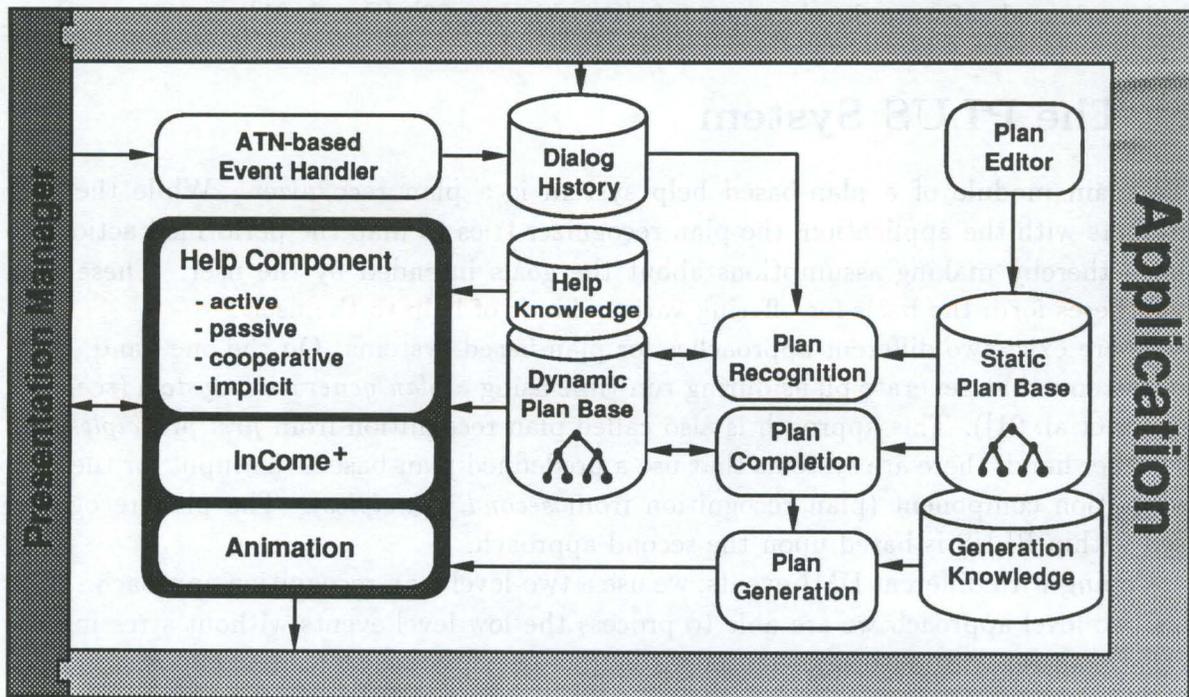


Figure 1: PLUS System Architecture

DMI-environments enable users to perform tasks in a very flexible way. Due to this, the number of considered plan hypotheses may increase without additional mechanisms to reduce their number. Therefore, we provide the following focussing methods:

- We introduced a *time frame* concept that splits plan hypotheses into different classes, considering the time stamps of their last activation. This classification serves as an instrument to decide, which plans are presented to the user if he requests help.
- For each plan a list of *cancel actions/goals* may be specified. The execution of a cancel action or the achievement of a cancel goal immediately dismisses the respective plan hypothesis. E.g., if the user explicitly removes an object used within a plan, this plan is dismissed.
- For each plan a list of *views* may be specified. A plan is only activated, if it is performed within one of its associated views. This concept supplies an additional cancellation mechanism. If a view is closed, all plans associated with that view can be dismissed.

The term *view* describes windows having a specific type. E.g., a window representing hierarchical information like father-child-relations about some data (hierarchical view) or a window showing vertical information like predecessor and successor relations of the same data (vertical view). By introducing *views*, specific actions may only be possible in specific views. E.g., connecting nodes that are on the same level of abstraction within a hierarchy is possible in the *vertical view*. In contrast, building father-child-relations is

only possible in the *hierarchical view*. In addition to the restriction of actions to views, plans may also be restricted to be performed completely within a specific view.

To enter the static hierarchical plan base, the interactive graphics-oriented plan editor *PlanEdit+* is used, which is described in more detail in the next section.

3 The Plan Editor

The plan hierarchy comprises three types of objects, *actions*, *plans*, and *goals*. It is organized as follows (cf. figure 2):

- The lowest layer consists of the *actions* the user can perform when interacting with the application. Actions may be parts of plans.
- A *plan* is defined by a set of actions and/or subgoals. Each plan is associated with exactly one goal that is reached, if the plan is completed.
- A *goal* may be achieved in different ways, each of them describing an alternative plan. Some of them may be suboptimal or wrong. Goals may be contained as subgoals within more abstract plans.

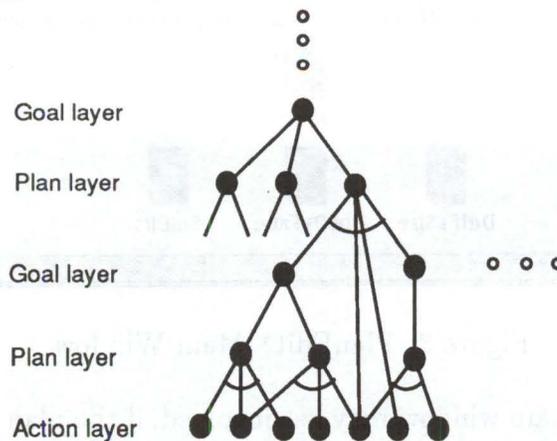


Figure 2: Plan Hierarchy

For each type of object in our planbase, certain properties may be defined. Therefore, we developed the plan description language *GPL+* (Goal Plan Language). By means of *GPL+* we are able to model several problems closely related to DMI environments like *optionality*, *multiple selection*, *iteration*, *parallelity*, and multiple *views* on objects. Besides, features common to plan recognition like parameter and temporal constraints, plan cancellation and plan interactions can be modeled. In addition, the elements of the plan base may be supplied with hierarchy information, thereby defining the structure of the plan hierarchy.

Grounded on the structure of our plan base — an object hierarchy with specific properties per element — we decided to chose an object-oriented internal representation for

the plan base. In order to offer the plan designer a comfortable input tool, we developed the graphics oriented plan editor PlanEdit⁺, that allows to build up the plan base interactively within a DMI environment.

Figure 3 shows the PlanEdit⁺ main window, in which the biggest part of the interaction takes place. The elements of the plan base are displayed as graphical objects. Each object consists of an icon representing the element's type and the element's name. The *Type Box* in the lower left corner of the main window contains icons for the three types of elements contained in the plan base: actions, plans and goals. These icons can be used to generate new elements of the respective types. The properties of the elements may be defined within a series of dialog boxes.

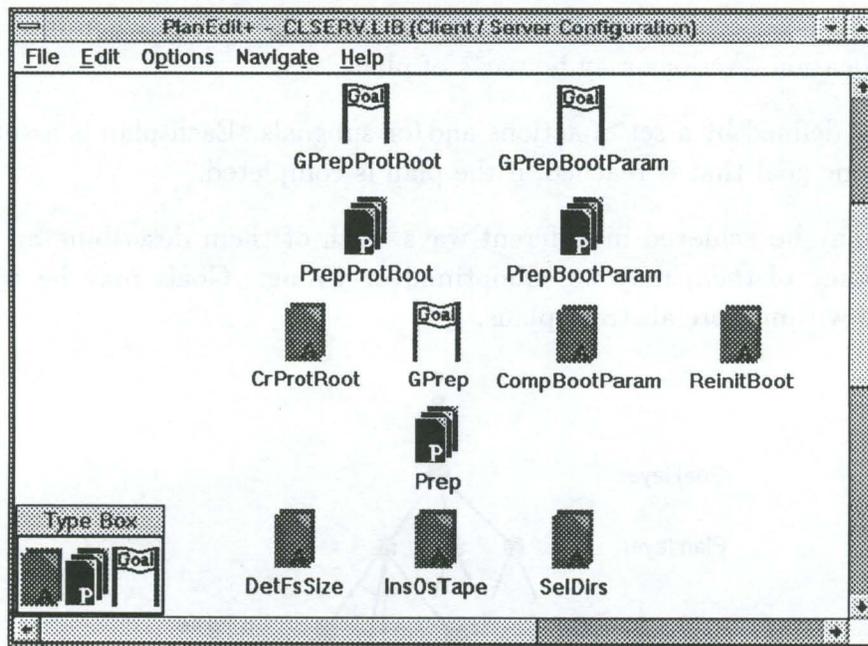


Figure 3: PlanEdit⁺ Main Window

The contents of the main window may get involved, if the plan base grows. Therefore, we added a second window type that enables us to separately examine the structure of previously defined plans and goals, and to easily modify their properties. Figure 4 shows an example of a plan window.

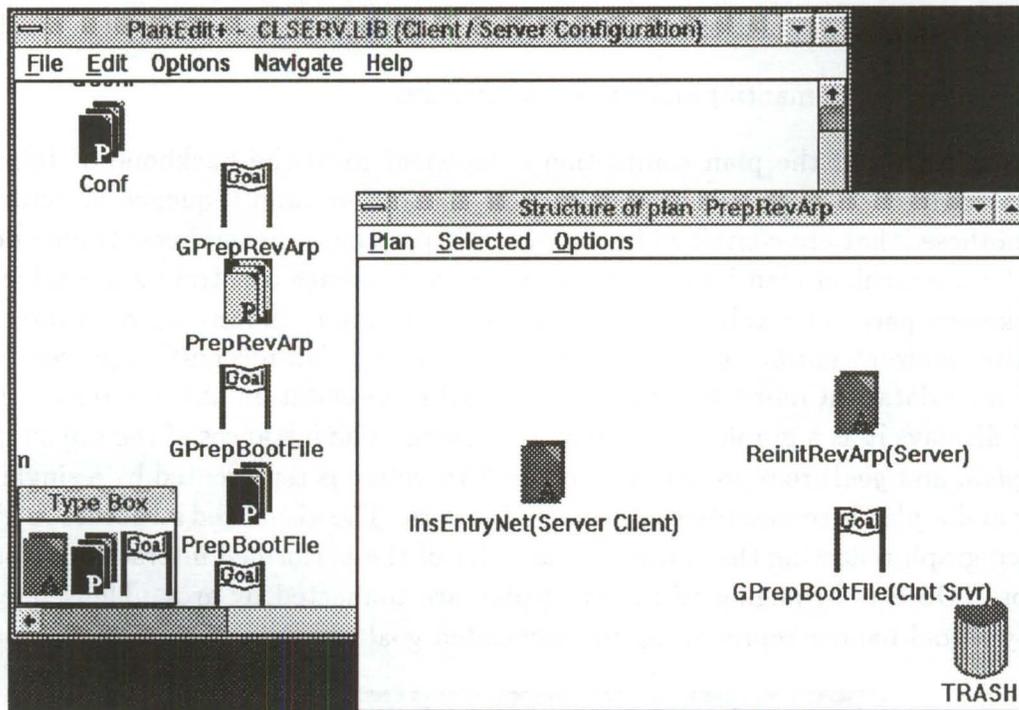


Figure 4: Different Window Types

In the main window, the elements of the plan base may be arranged arbitrarily without considering the structure of the plan base. Within a plan window, however, the layout of the objects corresponds to the logical sequence of the elements within the plan, as defined through the sequence constraints.

After the plan base is completely specified by using PlanEdit⁺, a corresponding Smalltalk module modeling the internal object-oriented representation of the static plan base is generated.

4 The Module InCome⁺

One of the central components for graphical help within the system PLUS is the *Interaction Control Manager* InCome⁺ (cf. [Thies 90], [Fehrle & Thies 91]). It provides a graphical visualization of the current dialog context, the dialog history, and possible future interactions. InCome⁺ gives the user a quick and helpful reminder on the system state to resume suspended tasks. It supports the user in leaving system states unfamiliar to him and in exploring actions (cf. [Paul 89]) that can be executed next to complete unfinished tasks. InCome⁺ meets the following demands:

- Adequate visualization of user interactions,
- Display of different levels of abstraction selectable by the user,
- Visualization of possible future interactions,
- Graphical navigation services,

- Display of plan interactions, like embedded, overlapping, and interrupted plans, and
- Task-oriented (semantic) undo/redo capabilities.

PlanRecognizer⁺ and the plan completion component form the backbone of InCome⁺. The plan completion component generates, on demand, a valid sequence of actions for plan hypotheses that are contained in the dynamic plan base. Several constraints defined within the hierarchical plan base are satisfied. E.g., sequence constraints are solved and already known parameter values are propagated according to parameter constraints.

PlanRecognizer⁺ notifies InCome⁺ about the ongoing plan recognition process. Upon the incoming data, InCome⁺ generates an internal representation of the interaction context and displays it as a graph structure on the screen. The instances of the object classes *action*, *plan*, and *goal* are represented as nodes. An *action* is represented by a single sheet of paper and a *plan* is represented by a stack of papers. The visualized structure resembles a directed graph reflecting the chronological order of the performed interactions from top to bottom. Objects belonging to the same plan are connected by arcs. The sequence is ended by a goal banner representing the associated goal (cf. figure 5).

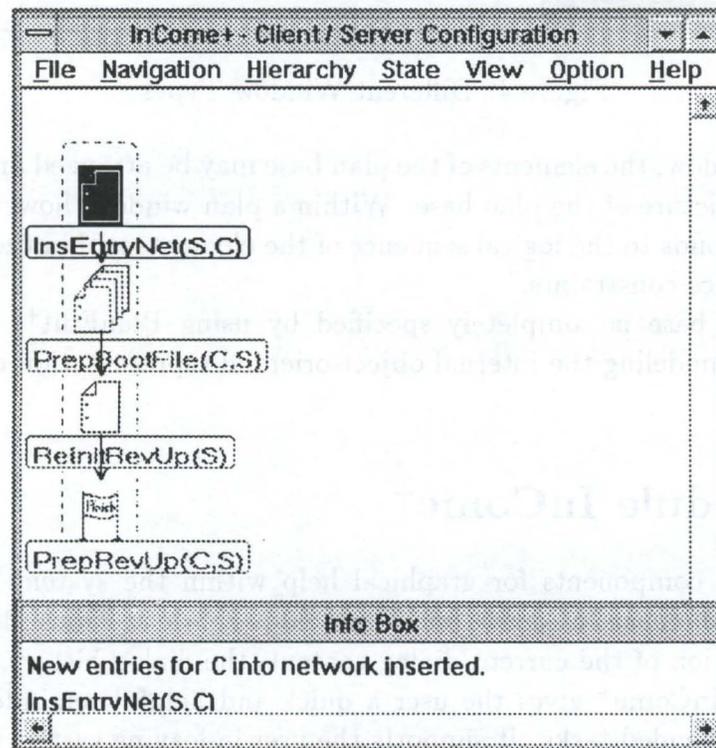


Figure 5: Visualized Elements within InCome⁺

InCome⁺ runs in its own window. The presented nodes are selectable via mouse clicks. User actions provided by InCome⁺ can be divided into four categories:

- Graphical navigation,
- Hierarchical navigation,
- Tutor activation, and

- Remote application interaction.

Graphical Navigation includes actions like *scrolling*, *overviewing*, and *searching* for specific nodes. The overview window (cf. figure 6) contains the whole visualized interaction structure by performing operations to display it on a reduced scale. Within the overview window several additional navigational actions like direct and indirect positioning of the standard window of InCome⁺ are possible.

Hierarchical navigation supports the user in viewing plans in different abstraction levels. InCome⁺ is able to generate a visualization of the different plan interactions that are handled during the plan recognition process.

Figure 7 shows an interaction context where plan $PrepBootParam(C,S)$ and $PrepProtRoot(S,C)$ overlap each other with the plan $Prep(C,S)$. Plan $PrepRootFile$ is embedded within plan $PrepRevUp$ as shown in figure 8.

InCome⁺ supports actions for *expanding* and *collapsing* plans. Expanding equals to a movement down in the hierarchy and collapsing equals to a movement up in the hierarchy. Expanding and collapsing of plans are realized within InCome⁺ by grouping sequences of actions together to plans or by replacing plans with their sequences of actions. Besides the step-wise vertical movement within the interaction hierarchy an additional feature is provided that works comparable to *Fish-Eye Lenses*. In the *Fish-Eye mode*, every object out of interest is abstracted to such a level that the focused plans are not effected.

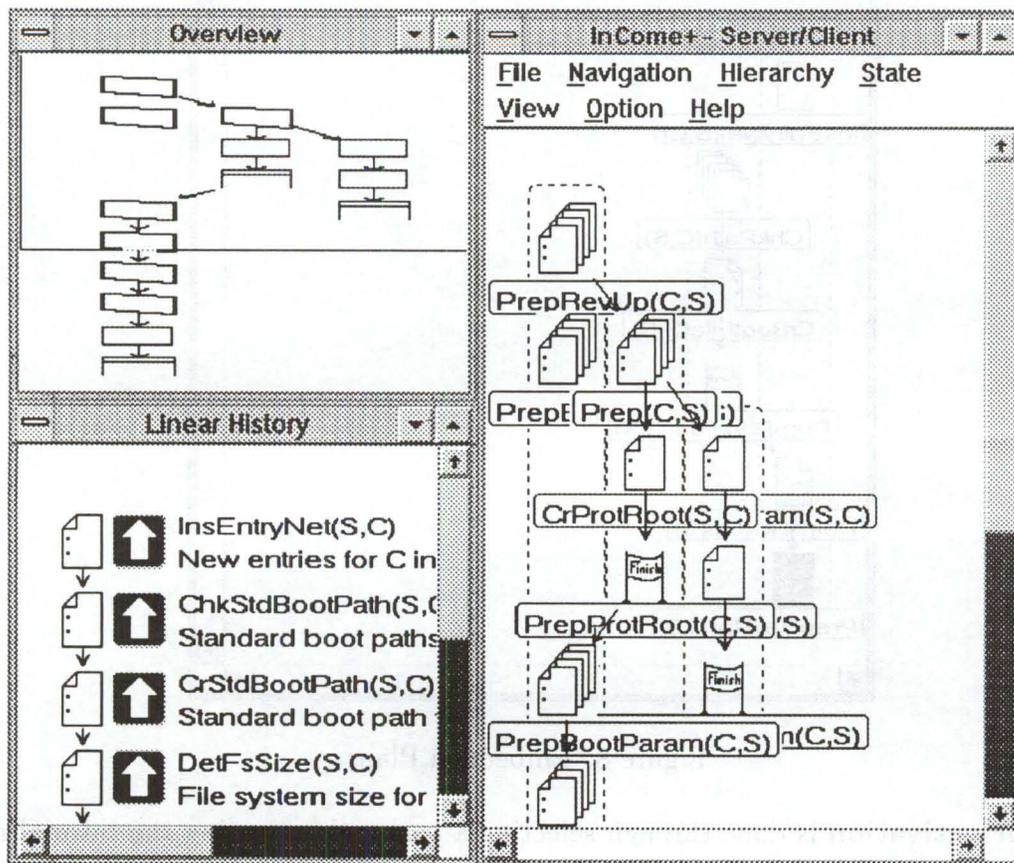


Figure 6: Linear History and Overview

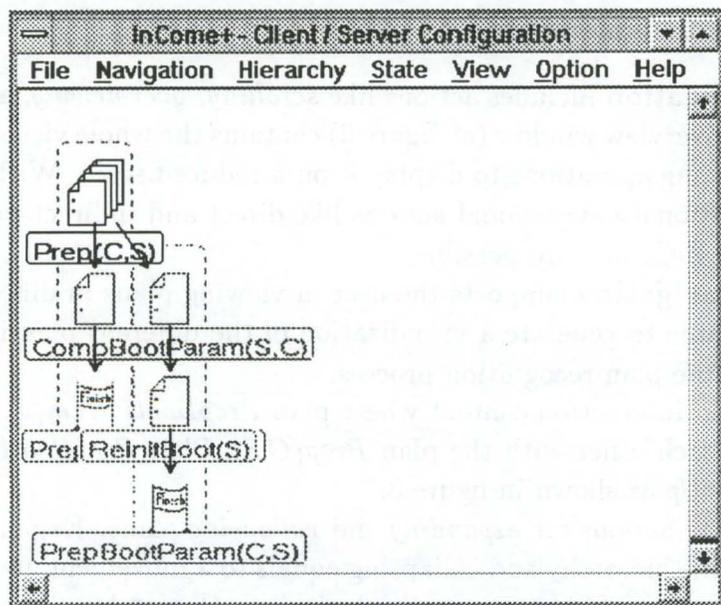


Figure 7: Overlapped Plans

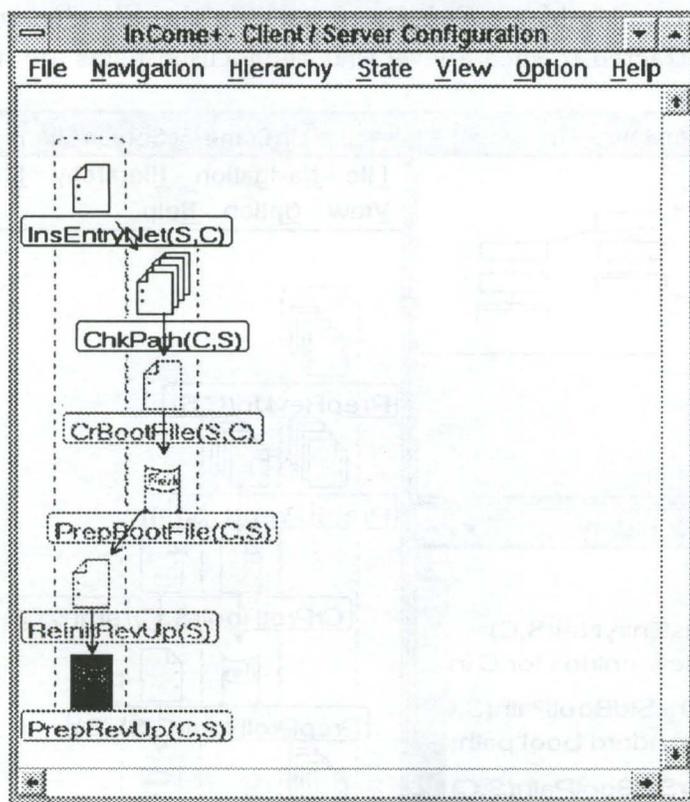


Figure 8: Embedded Plans

Tutor activation is done through selecting a goal and activating the tutorial mode. The user is guided by the system to reach the goal. After activating the tutorial mode InCome+ requests an optimal sequence of actions for reaching the selected goal. In this context *optimal* means the most efficient sequence of actions to reach a goal. The plan completion component generates this sequence by considering the different constraints

defined in the hierarchical plan base. Already known argument values are propagated. The sequence of actions is textually represented in a separate window like a *to-do-list* (cf. figure 9). The tutor of InCome⁺ supervises the executed user actions by marking performed actions in the *to-do-list* and showing the next steps necessary to reach the selected goal (cf. figure 10). If the user has performed an action that compromises the selected goal, InCome⁺ informs the user about this situation to allow a backtracking by performing undo operations leading to the previously valid system state.

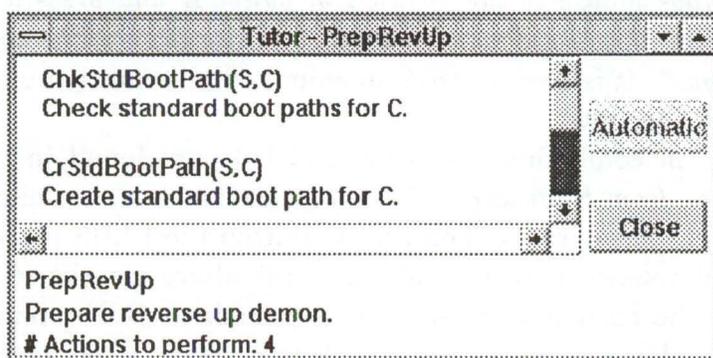


Figure 9: Tutorial Mode

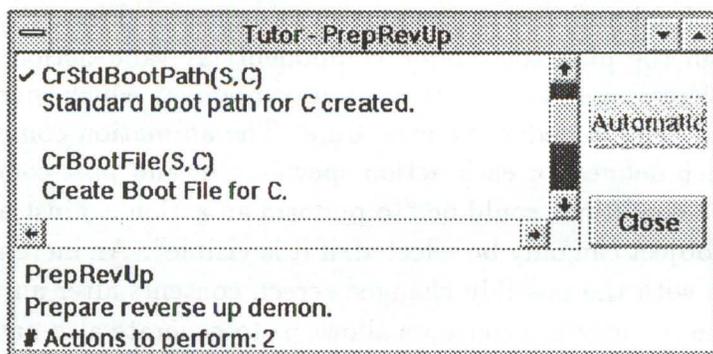


Figure 10: Tutorial Mode and Performed Actions

Remote application interaction is provided through the access to *undo-* and *redo-mechanisms* of the application. InCome⁺ provides an interface to these mechanisms. To be able to deal with two different undo principles (*function-oriented* vs. *state-oriented*; see also [Rathke 87], [Rathke 89], [Yang 90]), InCome⁺ uses an extended function-oriented approach by handling *freezing-points* (cf. [Paul 89]). Freezing-points are snapshots of system states that are saved within the application. It is possible to reset the application state to one of these freezing-points by activating the corresponding application function. By representing the interaction context in a more abstract way than by the linear dialog history the user can perform undo-actions and redo-actions on plans rather than on actions. We call this *undoing on a semantic level*. An undo of tasks without reversing tasks following them is not supported (*'freies undo'*, cf. [Rathke 87]).

The linear dialog history is presented in a separate window. The visualization emphasizes *reversible actions* and *freezing-points* that are set within the application. The lower left window in figure 6 represents the linear dialog history. The arrows on the right side of the actions mark *reversible actions*.

5 Animated Help

An outstanding claim in providing graphical user assistance is the coupling of animation and help. Conventional help systems and knowledge-based help system reach their limits as soon as the user needs assistance in performing interactions. E.g., the user addresses questions of the form: "How do I include object A into container-object B?" or "Please show me, how do I get objects X, Y, and Z visualized.". A generated textual help could possibly sound: "Move mouse to the position of object A and press left mouse button. Now move the mouse with pressed mouse button to the position of the container object B. Release mouse button.". It is obvious that an animated presentation of these interaction steps would be more adequate.

First approaches in combining animation and help are found in the system *GAK* (*Graphical Animation from Knowledge*, cf. [Neiman 82]) and in the animated help extension of *Cartoonist* (cf. [Sukaviriya & Foley 90]). Within the PLUS project an animation component will be developed that, in contrast to the above mentioned systems, reaches a closer relation to the current task the user is pursuing. By coupling the animation component with the plan recognizer and the plan completion component of PLUS, the animation component can generate a sequence of animated interactions for a specific plan hypothesis.

The generation of animation steps is done in two phases. First, the plan hypothesis is completed through the plan completion component. A valid action sequence for the plan is now available as input for the animation component which incrementally generates animation steps using a deductive procedure. The animation component accesses a knowledge base which defines for each action specific pre- and post-conditions. Informal examples of such pre-conditions could be "to perform an action against an object, it must be selected" or "an object can only be selected, if it is visible". An incremental generation is necessary to cope with the possibly changed screen contents after an animation step.

Representing generic interface concepts allows us to generate also navigational animation steps (e.g., steps to scroll the visible area within a window).

An animation is initiated in the PLUS system by selecting a goal and activating the corresponding menu function. The animation steps are done by imitating user actions and by sending them to the user interface in such a way that it responds to these 'animation inputs' exactly as if they were performed by the user.

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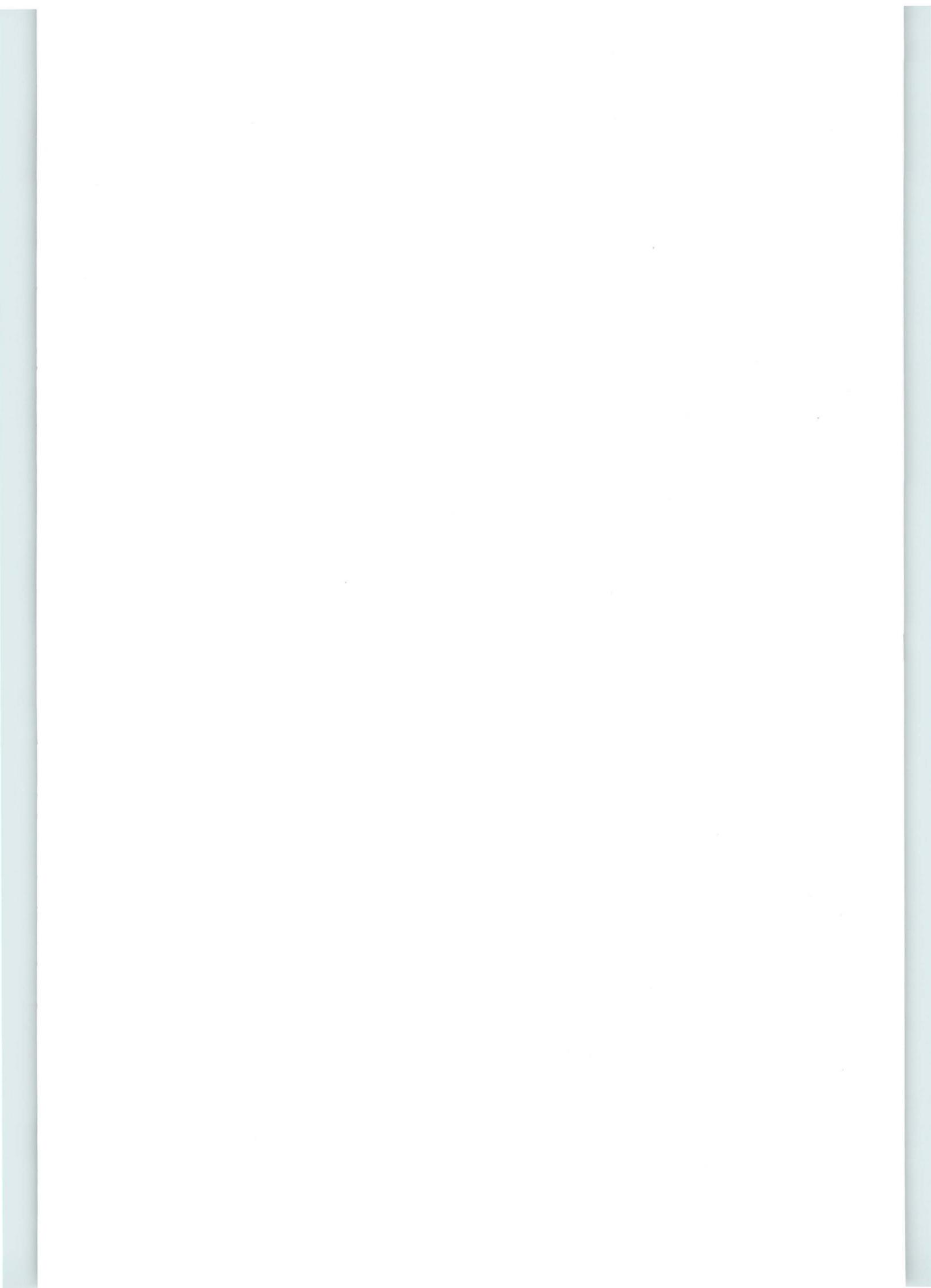
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