HMI course Human-Machine Interaction Bastien & Scapin ergonomic Criteria



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Bastien & Scapin's criteria

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Guidance



Workload



Explicit Control



Adaptability



Error Management



Consistensy



Significance of code



Cmpatibility

1.Guidance

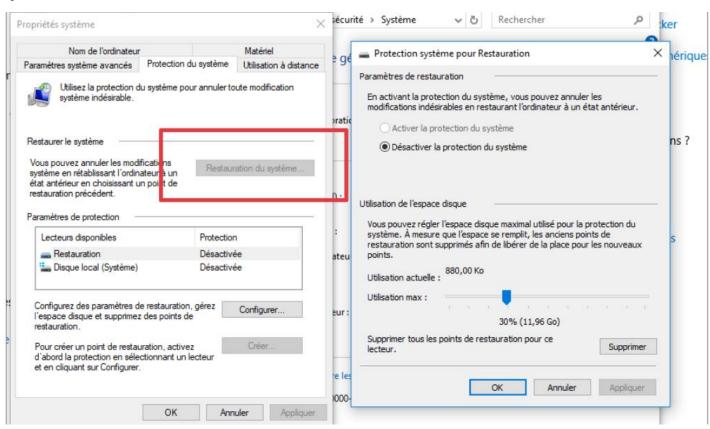
- User *Guidance* refers to the means available to advise, orient, inform, instruct, and guide the users throughout their interactions with a computer (messages, alarms, labels, etc.), including from a lexical point of view.
- Good guidance facilitates learning and use of the system by allowing the user: to know, at any time, where they are in a sequence of interactions, or in the accomplishment of a task; to know the permitted actions as well as their consequences; and obtain additional information (possibly upon request).
- The resulting ease of learning and use leads to better performance and fewer errors.

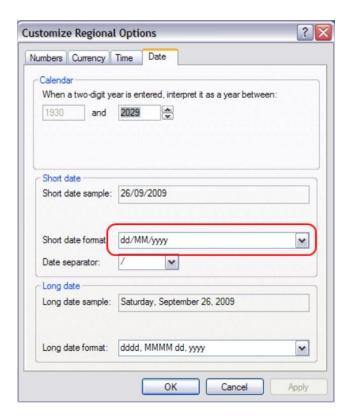
1.Guidance

- The criterion *Guidance* is subdivided into four criteria:
 - Prompting,
 - Grouping/Distinction of Items,
 - Immediate Feedback,
 - and Legibility.

• <u>Prompting</u> is defined more broadly than usual. It refers to the means offered to guide users through certain actions, such as data entry or other tasks. This criterion also includes all of the aids that assist users in determining their options when many actions are conceivable depending on the circumstances. Prompting also includes status information, which is information about the system's current state or context, as well as information regarding help facilities and their accessibility.

Grey out unavailable commands



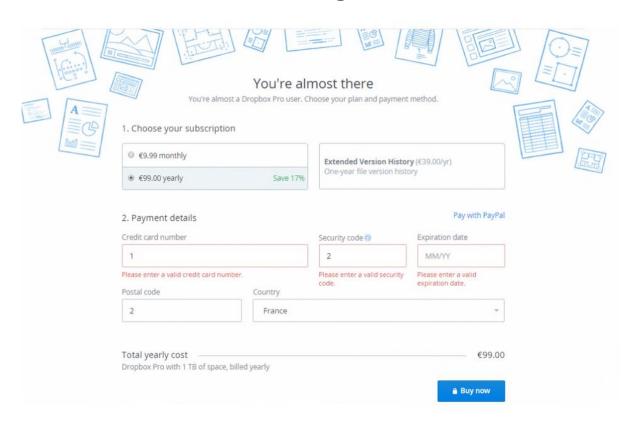


Guide data entries by indicating the correct format and acceptable values

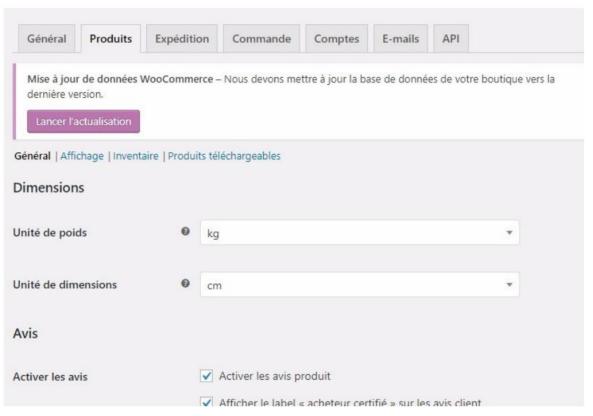


Active field made visible at the time of entry

• Indicate all status information (e.g.: modes, values, etc.)



Display the units of measurement for the data to be entered

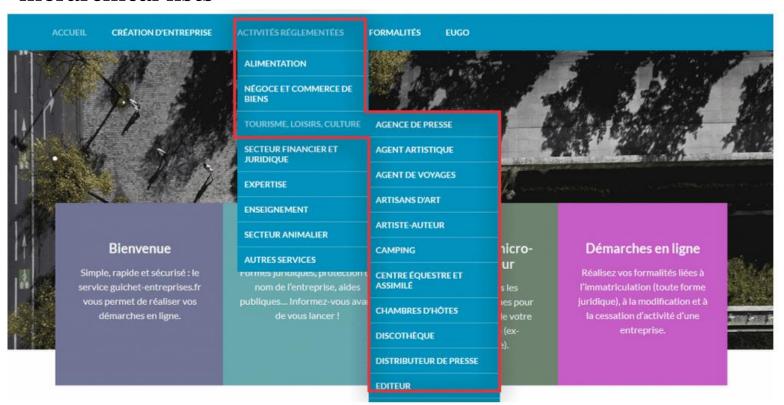


1. Guidance > Grouping/Distinction of items

• The visual structuring of information items in respect to each other is addressed by the *Grouping/Distinction* between Items criterion. This criterion considers the topology (location) and certain graphic characteristics (format) to illustrate the relationships between the various items displayed, their membership or non-membership in the same class, or even to demonstrate the distinction between different classes of items. This criterion also applies to the arrangement of items within the same class.

1. Guidance > Grouping/Distinction by location

• As much as possible, items should be organized according to hierarchical lists



1. Guidance > Grouping/Distinction by format

• Establish a visual distinction between areas with different functions (command, message, etc.)



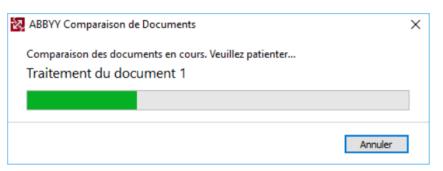
1. Guidance > Immediate Feedback

- Immediate Feedback means the computer's response following user actions or requests. It can be a simple press of a key or the entry of a sequence of commands, whatever the action, and in all cases, the computer must respond, within a time frame consistent with the request of the use.
- The quality and speed with which feedback is provided are two critical variables in developing user trust and happiness, as well as their understanding of the exchange. These elements provide users with a thorough understanding of how the system works.
- Expected feedback from the system:
 - quality
 - speed

1. Guidance > Immediate Feedback

• Make the processing carried out by the application visible. Actions in progress must be indicated







1. Guidance > Immediate Feedback

The search engine uses auto-completion



1.Guidance > Immediate Feedback

• In a form, the fields are directly checked upon entry

Definen	Colina	
Prénom	Salim	
Nom		S Votre nom de famille est requis
Nom d'utilisateur		
Mot de passe		
Confirmez le mot de passe		
Adresse e-mail		
Quel format est le mieux ?	○ 14/02/07 · ○ 02/14/07	
	J'ai lu et j'accepte les <u>conditions d'utilisation</u> .	
	Enregistrement	

- The *legibility* of information on the screen is concerned with the presentation of information on the screen that may hinder or facilitate reading of this information (luminance of characters, background character contrast, size of letters, spacing between words, spacing between lines, spacing between paragraphs, length lines, etc.).
- By definition, the criterion *Legibility* does not concern feedback or error messages

Avoid writing entire paragraphs in capitals

CONTRAT DE LICENCE DU LOGICIEL ONYX

Writing in capital letters

Veuillez ure attentivement ce contrat de licence de logiciel avant d'utiliser le logiciel en utilisant ce logiciel, vous reconnaissez être lié par les termes de cette licence en cliquant sur le bouton "accepter", si vous êtres en désaccord avec les termes de la licence, cliquez sur "refuser"

1. ONYX EST UNE APPLICATION LUBRE ET GRATUITE (FREENARE). ELLE EST LUBREMENT UTILISABLE ET VOUS POUVE LA DIFFUSER AUTANT DE FOIS QUE VOUS LE SOUHAITEZ ET L'UTILISER AUSSI LONGTEMPS QUE VOUS LE DESIREZ.

2. VOUS RECONNAISSEZ ET ADMETTEZ EXPRESSÉMENT QUE L'UTILISATION DU LOGICIEL ONYX EST À VOS RISQUES ET PÉRILS ET QUE LA TOTALITÉ DU RISQUE RELATIF À LA QUALITÉ, AUX PERFORMANCES, À L'EXACTITUDE ET AU MANIEMENT SATISFAISANTS REPOSE SUR VOUS.

3. LE LOGICIEL ONYX EST FOURNI "TEL QUEL" AVEC TOUS SES DÉFAUTS ET SANS AUCUNE CARANTIE D'ALCUNE SORTE.

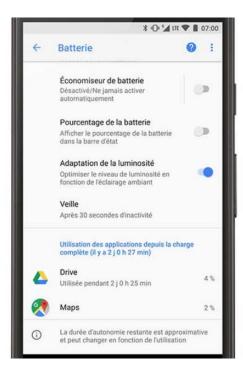
4. EN ALCUN CAS JE NE SERAI RESPONSABLE DE DONMAGE CORPOREL NI DE QUELCONQUE DOMMAGE ACCIDENTE, SPÉCIAL, NIDRECT OU ACCESSORE, Y COMPRIS DE FAÇON NON LINITATIVE, LIS DOMMAGES DUS AUX PERTIS DE RÉNÉFICES, PRETS BE DONNÉS, INTERRUPTION DES ACTIVITÉS OUT TOUT AUTRE DOMMAGE COMMERCIAL OU PERTE COMMERCIALE RÉSULTANT DE OU RELATIFS À VOTRE UTILISATION OU VOTRE MAPTITUDE À UTILISER LE LOGICIEL ONYX, QUELLE QU'EN SOIT LA CAUSE.

Afficher au lancement de l'application REFUSER ACCEPTER

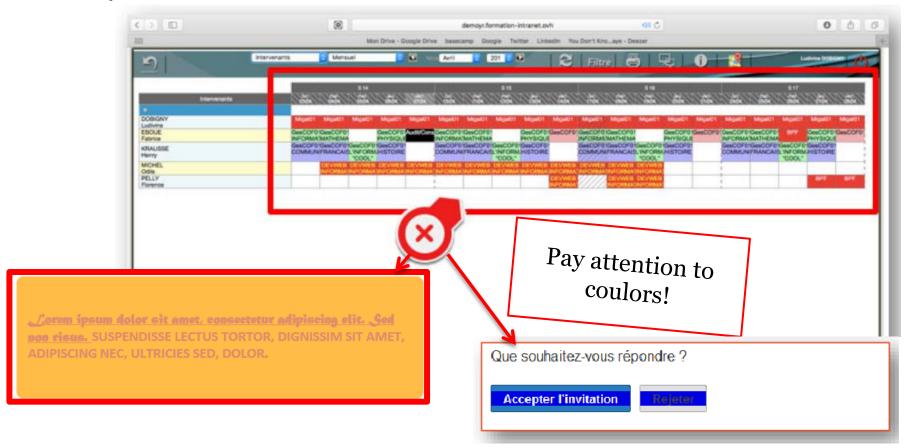
- ✓ Use capital letters for acronyms
- ✓ Use capital letters if necessary to highlight a key word
- ✓ Use capital letters if necessary for short titles (3/4 words max)
- X Avoid capital letters on technical, English, Germanic words, etc.
- **X** Avoid capital letters on buttons
- X Avoid capital letters on navigation elements
- X Never use capital letters for a line of text, instructions, paragraph

- Use dark letters on a light background for better readability
- It is possible to distinguish the status of each text by sufficiently marked nuances of contrast





Pay attention to the coulors!



2. Workload

- The "workload" ergonomic criterion reduces the quantity of actions required from the user. This involves decreasing the perceptual or memory load.
- The Workload criterion has two sub-criteria: Brevity (which includes the Conciseness and Minimal Actions criteria) and Information Density.
- The right questions to ask yourself:
 - Are perception and memory activities kept to a minimum?
 - Is the dialogue simple?

2. Workload > Brevity

- The *Brevity* criterion concerns the workload at the perceptual and memory level both for individual input or output elements and input sequences (ie, the sequences of actions necessary to achieve a goal, to accomplish a task).
- The aim here is to limit as much as possible the work of reading, input and the steps that users must go through.

The right questions to ask yourself

- Are the labels short?
- Are seizures kept to a minimum?
- Is the number of steps to achieve a goal minimal?
- Are there any shortcuts?

• Short-term memory capacities are limited. Therefore, the shorter the entries, the lower the risk of errors. Furthermore, the more succinct the items, the shorter the reading time.

Objective :

Reduce perception and memorization activities

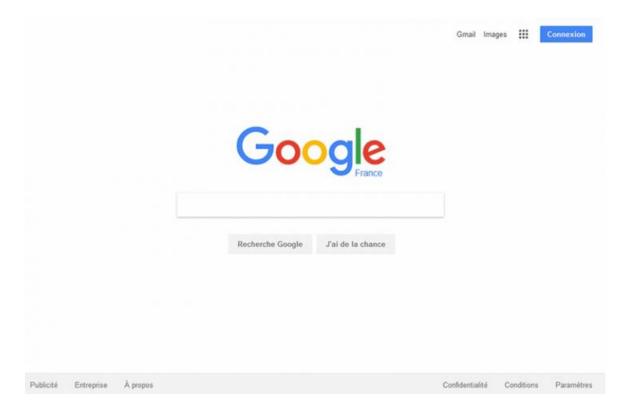
• For what?

To reduce mental load and the risk of errors

How ?

Limit the elements displayed to the strict minimum, use "progressive unveiling"

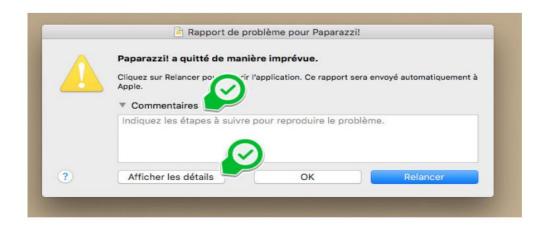
Avoid presenting too many buttons to the user



The "comments" field and details are closed by default.



But it is possible to display these fields according to the use you wish.



• A form that is too rich in input fields in no way respects the principle of conciseness which is essential here to complete the task in a reasonable time.



2. Workload > Brevity > Minimal Actions

- *The Minimal Actions* concerns the workload regarding the actions necessary to achieve a goal, to accomplish a task. This involves delimiting as much as possible the stages that users must go through.
- The more numerous and complicated the actions necessary to achieve a goal, the more the workload increases and therefore the higher the risk of errors.

Objective

Reduce the number of actions requested from the user

• For what?

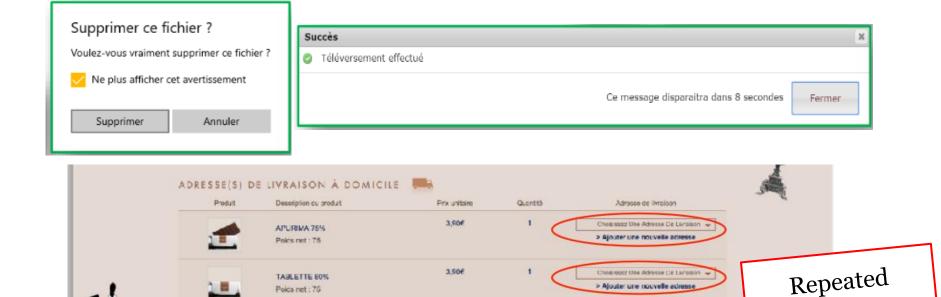
To limit user actions and the risk of errors

How?

Pre-fill fields, remember user preferences...

action!

2. Workload > Brevity > Minimal Actions



3,90€

3,00€

3,90€

> Ajouter une nouvelle adresse

> Ajouter une nouvelle adresse

> Ajouter une nouvelle adross

Cholsessa Une Adresse De Livatson ...

Choiseasa, Une Adresse Do Liv sison w

Chokrasez Une Adresse De Livreison -

> Ajouter une nouvelle adresse

TABLETTE EO%

Poids net: 75

KOOH175%

Poics net: 75

LAIT AVANDES

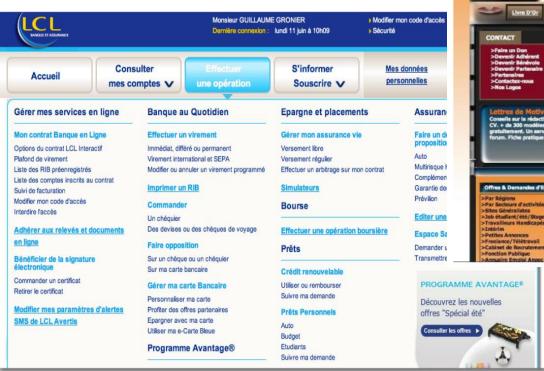
ORANGERIE 62%

Poice net: 75

Poice net: 75

- This involves minimizing the quantity of information and visual components. In most tasks, user performance is negatively influenced when the information load is too high or too low. The probability of error increases. It is therefore necessary to delete elements unrelated to the content of the current task.
- It is also necessary to avoid imposing on the user the memorization of long and numerous pieces of information or procedures (short-term memory is limited)

Too much information density

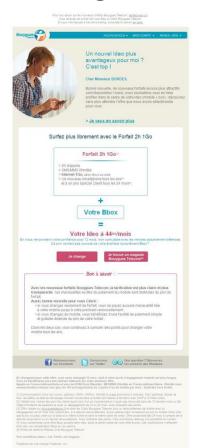




• the essentials on screen for maximum emotional impact



avoid overloading an email presenting an offer



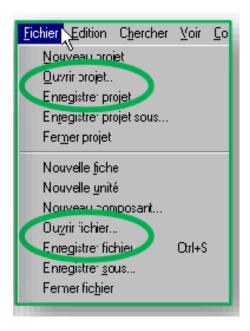


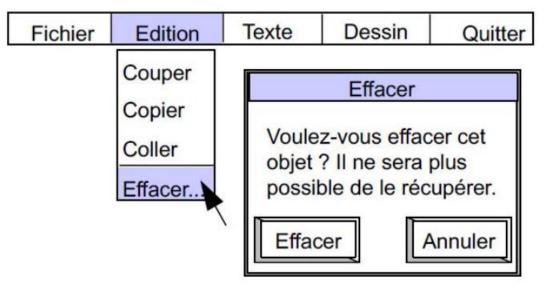
3. Explicit control

- The criterion *Explicit Control* concerns both the system processing of explicit user actions, and the control users have on the processing of their actions by the system.
- Processing only takes place if the user requests it. This involves explaining the relationship between the operation of the application and the actions of the users.
- The relationship between user actions and system responses must be explicit, that is, the system must perform:
 - Only actions requested by the user,
 - The moment he asks for them.

3. Explicit control > Explicit actions

- The software must only perform operations requested by the user
- Add a clear or exit button to the form
- Physical validation action: "Ok" button or click





3. Explicit control > Explicit actions

Avoid formatting or automatic downloads without settings by users

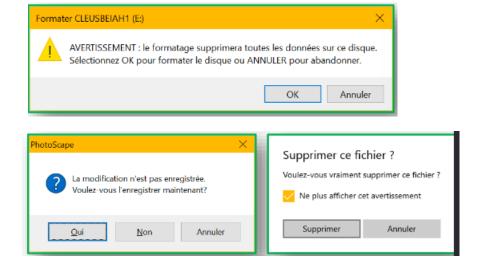


3. Explicit control > User control

- Reversibility possibility of retracing one's steps, of canceling one's actions.
- The user must be able to control the progress of computer processing in progress.

It must be able to authorize the user to interrupt any processing in progress

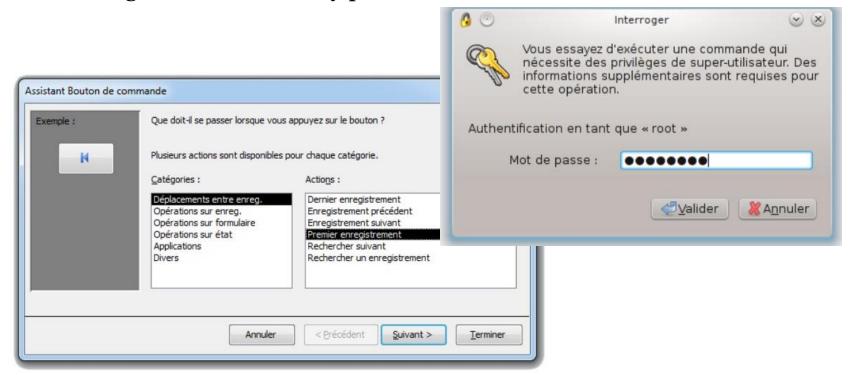
if they wish, for example.





3. Explicit control > User control

- Allow rollbacks
- Provide rollback capability leading to undoing current changes and reverting to the immediately previous version.



3. Explicit control > User control

The user must be able to adapt the interface according to their preferences



4. Adaptability

- The *adaptability* of a system refers to its capacity to behave contextually and according to the users' needs and preferences.
- Adaptability is therefore the ability of the HMI to adapt to a varied population of users:
 - Different types of users
 - Different usage strategies

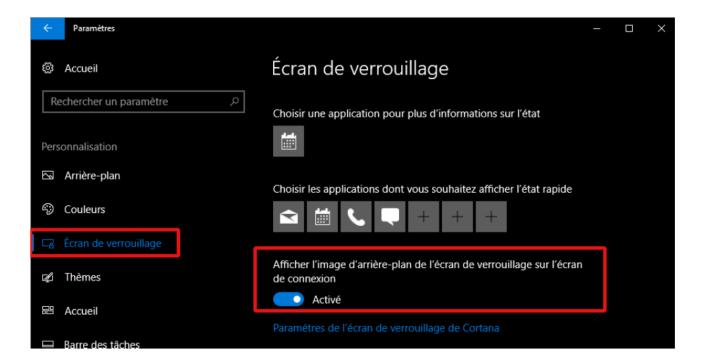
Objective

- Allow customization of the interface by letting the user choose the procedure that suits them best
- For what?
 - Different users have different needs
- How ?
 - Leave the default display, values and processing configurable...

4. Adaptability > Flexibility

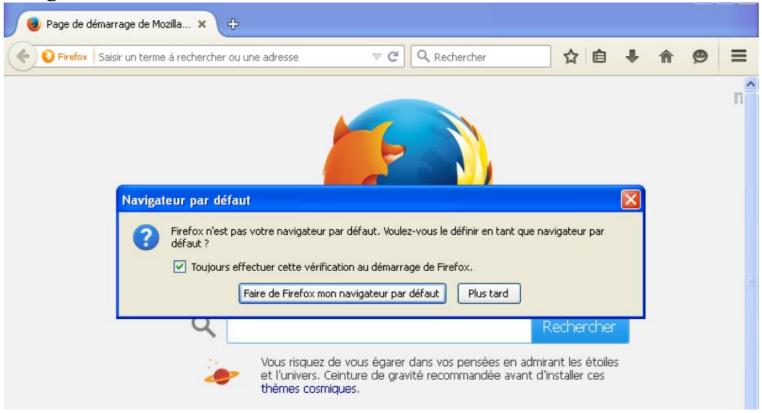
• The more diverse the ways of carrying out the same task, the greater the chances that the user will be able to choose and master one of them, during their learning.

Possibility of customizing its interface.



4. Adaptability > Flexibility

 Propose alternatives but always the possibility of returning to the default configuration.

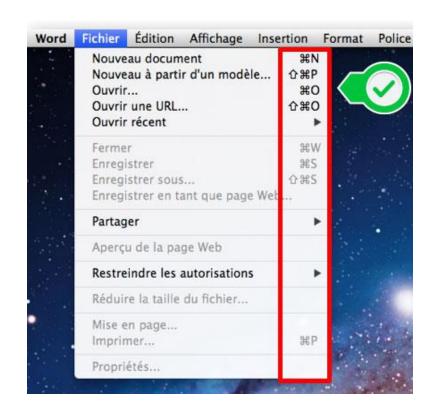


4. Adaptability > Flexibility

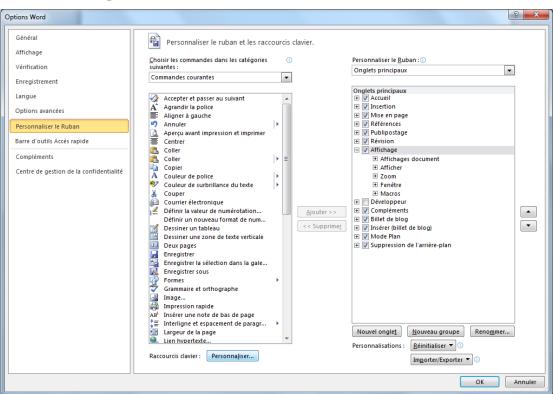
Other recommendations

- For data entry, when default values are not known in advance, the system must allow users to set, change or delete these values.
- When certain displays are unnecessary, users should be able to temporarily disable them.
- The sequence of data entries should be able to be changed to accommodate the order desired by users.
- When the format of a document cannot be specified in advance, users should be allowed to define one and save it for later use.

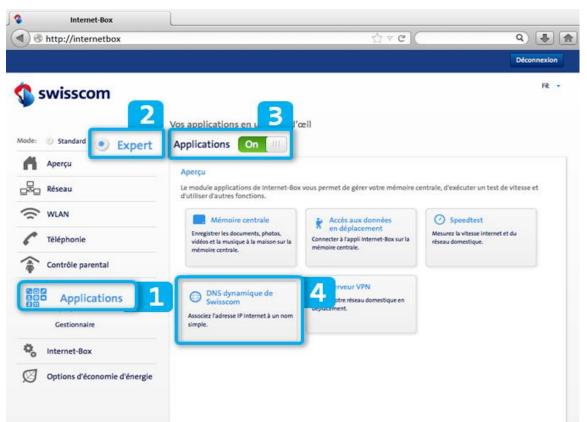
- The criterion *User Experience* refers to the means available to take into account the level of user experience.
- Experienced users do not always have the same information needs as novices. It may be desirable to provide very guided, step-by-step transactions for inexperienced users.



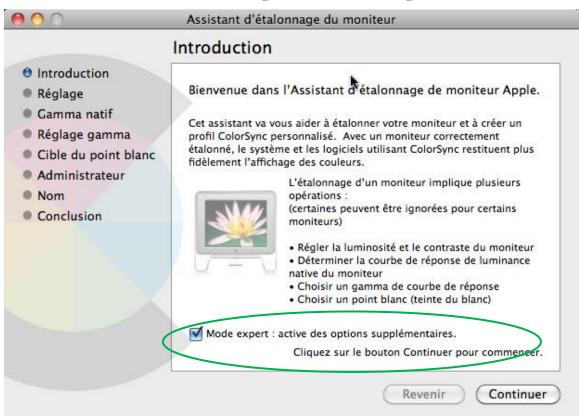
 Allow power users to customize the software or application interface (show more or fewer settings)



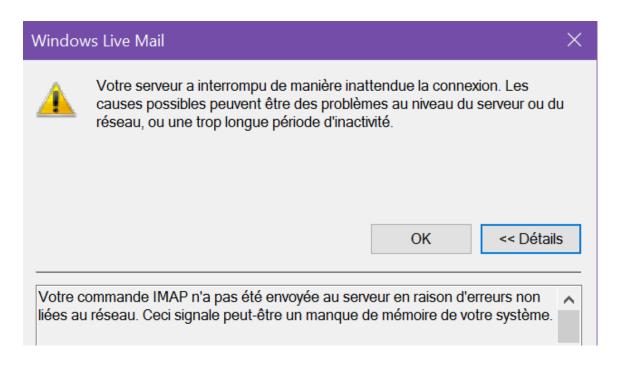
 Provide step-by-step or multiple input choices depending on user experience.



• Allow different dialogue modes corresponding to different user groups (example: allow an incentive adapted to the experience level of the users).



• Users should be able to request a level of detail in error messages that depends on their level of knowledge.



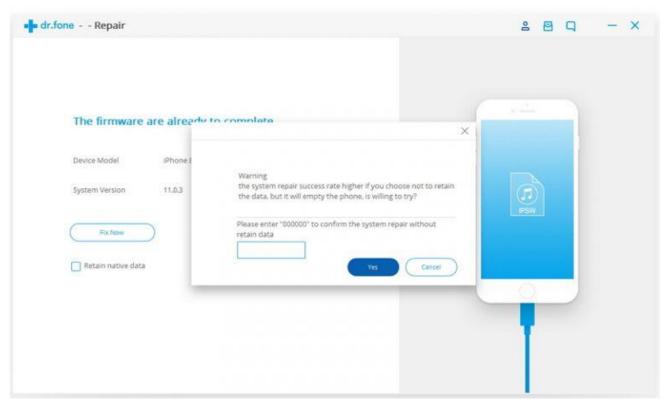
5. Error Management

- The *Error Management* criterion concerns all the means allowing on the one hand to avoid or reduce errors, and on the other hand to correct them when they occur.
- Interruptions caused by errors negatively impact user activity
- Errors lengthen transactions and disrupt planning. The more errors are limited, the fewer interruptions there are during the completion of a task and the better the performance.
- Three sub-criteria participate in Error Management : *Protection Against Errors* , *Quality of Error Messages and Error Correction* .

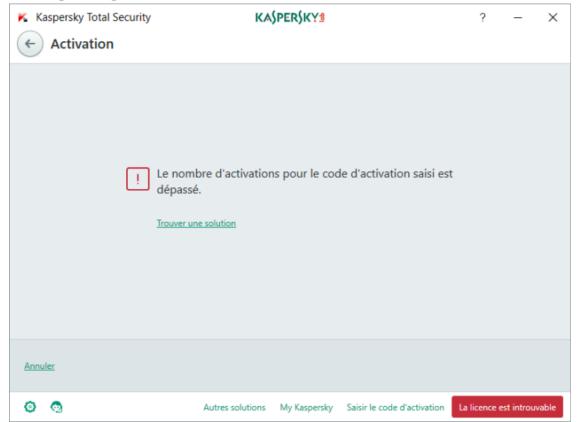
- The **Error Protection** criterion concerns the means put in place to detect and prevent data entry or command errors or actions with harmful consequences.
- To do:
 - Inform
 - disable unavailable orders
 - announce irreversible commands
 - protect sensitive actions
 - provide expected values, units
 - limit inputs
 - use adapted components
 - pre-fill forms (auto-completion)
 - control input

• When users end a session and there is a risk of data loss, there should be a message indicating this and requesting confirmation that the session has

ended.



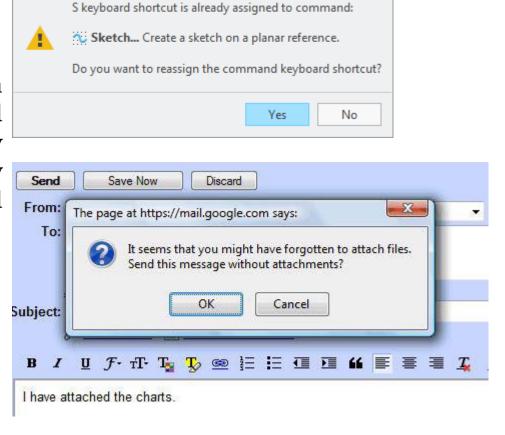
• When an installation has failed or the deadline has passed, a message must warn the user giving them the means to decide what to do next.



The validation button is grayed out until all selections have been made.



 All possible actions on an interface must be considered and more particularly accidental keyboard key presses so that unexpected inputs are detected.

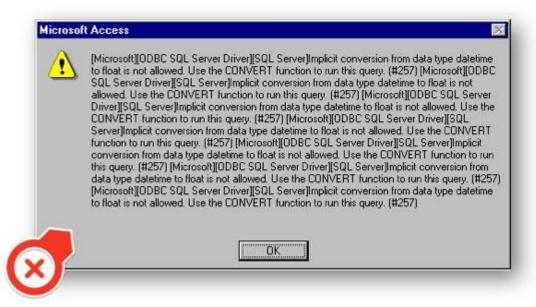


Keyboard Shortcut Conflict

5. Error Management > Quality of error message

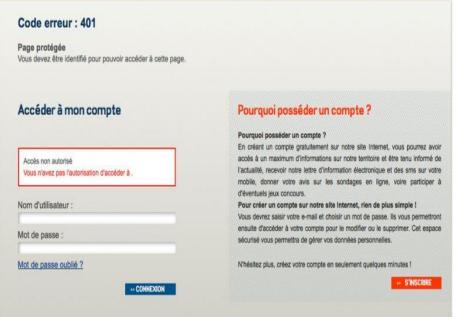
 Message quality promotes system learning by telling users the reasons or nature of their errors and telling them what they should or should have done.

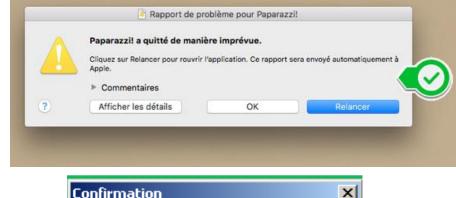
For example, The error message must be readable and perfectly understandable



5. Error Management > Quality of error message

If the user selects an invalid function key, no action should result other than a message indicating the functions appropriate for that step in the transaction. Provide task-oriented error messages.



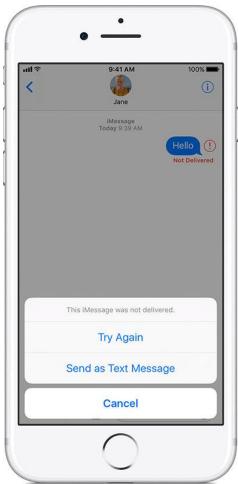


Vous devez saisir le nom du client

X

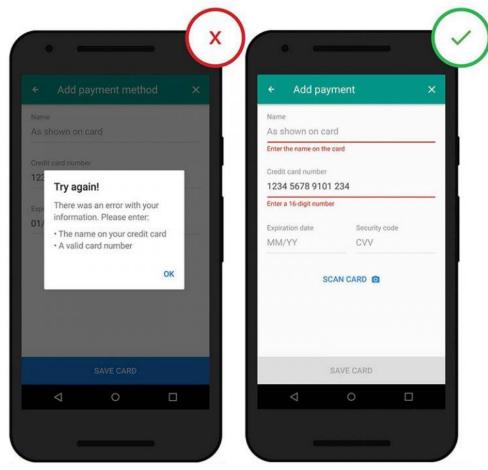
5. Error Management > Quality of error message

 Avoid messages inviting you to try again without indicating the reason for the failure.



5. Error Management > Quality of error message

 Adopt neutral, nonpersonalized, nonreproachful vocabulary in error messages.

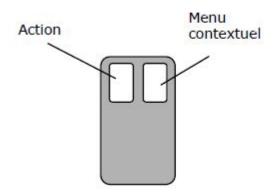


- The criterion *Consistency* refers to the way interface design choices (codes, naming, formats, procedures, etc.) are maintained in similar contexts, and are different when applied to different contexts.
- Procedures, labels, commands, etc., are all the better recognized, located and used if their format, location, or syntax is stable from one screen to another, from one session to another. Under these conditions the system is more predictable and the learning more generalizable; errors are reduced.
- Lack of consistency can significantly increase search time.
- Lack of uniformity is also an important reason for refusal of use.

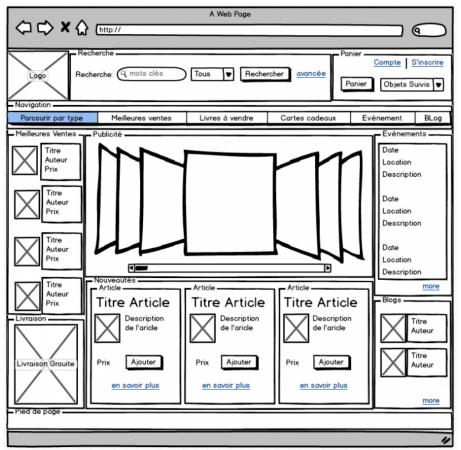




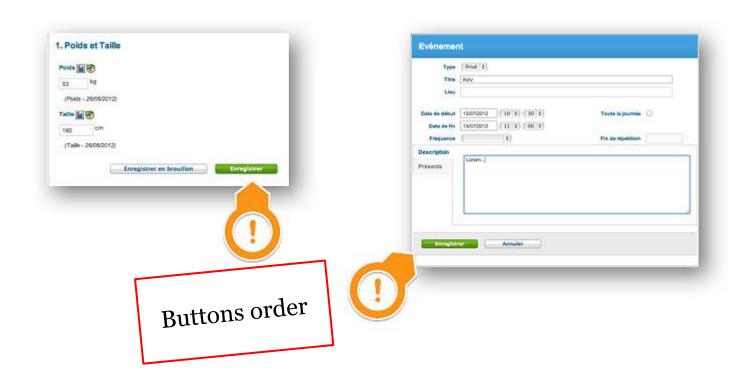
Mouse button semantics



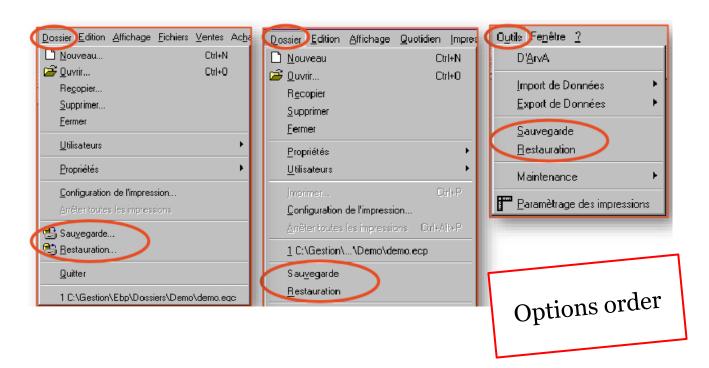
Web page templates



Are the data presentation formats consistent?



Are the data presentation formats consistent?



- Warning: not moving commands
- Example Microsoft office





Office 2010



Office 2007



Other examples of recommendations

- The format of data entry fields must always be the same.
- Similar localization of window titles.
- Consistency between the window title and the item chosen in the menu.
- Similar procedures for accessing menu options.
- Similar screen formats.
- Is the window arrangement similar (model)
- Are colors, icons and fonts used consistently?
- Is a uniform vocabulary used across all windows?
- Is the mouse operation consistent?

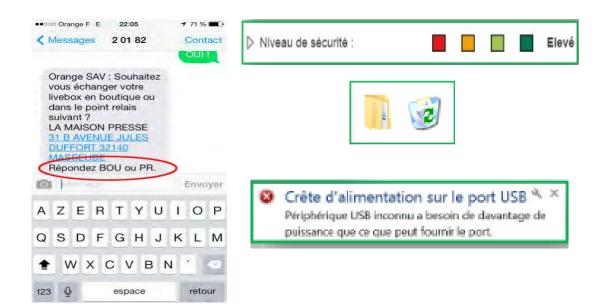
7. Significance of code

- The criterion *Significance of Codes* qualifies the relationship between a term and/or a sign and its reference. Codes and names are significant to the users when there is a strong semantic relationship between such codes and the items or actions they refer to,
- When encoding is meaningful, recall and recognition are better. In addition, codes and names that are not meaningful to users may suggest inappropriate operations and thus lead to errors. .

7. Significance of code

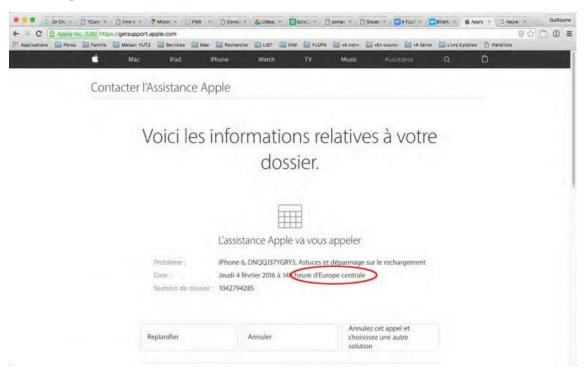
- Titles must convey what they represent, and be distinct.
- Make abbreviation rules explicit.





7. Significance of code

• Use meaningful and familiar codes and names rather than arbitrary codes and names. Avoid the mention below "Central European Time" which means nothing to most of us.



- The criterion *Compatibility* refers to the match between users' characteristics (memory, perceptions, customs, skills, age, expectations, etc.) and task characteristics on the one hand, and the organisation of the output, input, and dialogue for a given application, on the other hand.
- The criterion Compatibility also concerns the coherence between environments and between applications.
- The transfer of information from one context to another is all the more rapid and efficient as the volume of information to be recoded by the user is reduced.
- Performance is best when information is presented in a directly usable form.

- The left menu bar takes advantage of the functional similarity between commands, but it requires the user to open a new menu for each operation.
- On the contrary, the organization on the right, modeled on the task, allows you to find all the commands relating to a subtask in the same menu.

Éditer	Imprimer	Envoyer	
Ventes	Ventes	Ventes	
Commandes	Commandes	Commandes Stocks	
Stocks	Stocks		

Ventes	Commandes •	Stocks	
Éditer	Éditer	Éditer	
Imprimer	Imprimer	Imprimer Envoyer	
Envoyer	Envoyer		

• The order of the input fields must correspond with the user's habits. **Compatibility problem:** a French user is likely to make a mistake when entering the postal code.

Company: Industry Sector: Address:	Select One
City State/Province Zip: Country:	United States
Note: We respect electricumstances.	tronic privacy and will NOT give out your name and address under any
Submit Form	

 Adaptation of the interface according to user habits.

Taking into account the compatibility criterion: The form adapts according to the nationality of the user.

Postage is requ		e enter addr		Gift Voucher or payment for a service).
Coun	try: United	Kingdom	Y	Select Country
	The state of the s	and postal add	lress must	t be in the same country.)
First Na	me:			
Last Na	me:			
Postal Addres	s 1:			
Postal Addres (optio				
Town/C	ity:			
Cour	nty: Engla	and		~
Postal co	de:		1	
 L'envoi est néc 		euillez entrer		en ligne, chèque-cadeau, paiement pour un service, etc se ci-dessous) Sélection d'un pays
L'envoi est néoPo	cessaire (ve ays: France Livraiso	euillez entrer	l'adress	se ci-dessous)
 L'envoi est néc 	cessaire (ve ays: France Livraiso	euillez entrer	l'adress	se ci-dessous) Sélection d'un pays
L'envoi est nécPréno	cessaire (ve ays: France Livraiso	euillez entrer	l'adress	se ci-dessous) Sélection d'un pays
L'envoi est nécPréno	m:	euillez entrer	l'adress	se ci-dessous) Sélection d'un pays
L'envoi est néc Préno No	m: n 1: n 2: tatif)	euillez entrer	l'adress	se ci-dessous) Sélection d'un pays

• Units **of measurement** should be those normally used.



Other recommendations

- The organization of the information displayed must conform to the organization of the data to be entered.
- Dialogue procedures must be compatible with the order as the user imagines it or is used to it.
- The terms used must be familiar to users and relative to the task to be performed.
- The display of text on the screen must conform to the conventions used for the presentation of texts on paper.

Summary

- Bastien & Scapin's criteria are references in computer ergonomics and in the design of user-centered HMI interfaces.
- These criteria adapt to different uses and are suitable for carrying out simple and rapid expert evaluations, even by non-specialists.
- These evaluation criteria are encapsulated in an analysis grid containing 8 ergonomic criteria, with the aim of revealing usability problems that make interaction with the UI interface less interesting and more complicated.



Questions?