chapter 15

task models

What is Task Analysis?

Methods to analyse people's jobs:

- what people do
- what things they work with
- what they must know

An Example

- in order to clean the house
  - get the vacuum cleaner out
  - fix the appropriate attachments
  - clean the rooms
  - when the dust bag gets full, empty it
  - put the vacuum cleaner and tools away
- must know about:
  - vacuum cleaners, their attachments, dust bags, cupboards, rooms etc.

Approaches to task analysis

- Task decomposition
  - splitting task into (ordered) subtasks
- Knowledge based techniques
  - what the user knows about the task and how it is organised
- Entity/object based analysis
  - relationships between objects, actions and the people who perform them
- lots of different notations/techniques

general method

- observe
- collect unstructured lists of words and actions
- organize using notation or diagrams

Differences from other techniques

Systems analysis	**vs.**	**Task analysis**
system design	focus	the user

Cognitive models	**vs.**	**Task analysis**
internal mental state	focus	external actions
practiced `unit' task	focus	whole job

Task Decomposition

Aims:

describe the actions people do
structure them within task subtask hierarchy
describe order of subtasks

Variants:

Hierarchical Task Analysis (HTA)
most common
CTT (CNUCE, Pisa)
uses LOTOS temporal operators

Textual HTA description

Hierarchy description ...

0. in order to clean the house
    1. get the vacuum cleaner out
    2. get the appropriate attachment
    3. clean the rooms
        3.1. clean the hall
        3.2. clean the living rooms
        3.3. clean the bedrooms
    4. empty the dust bag
    5. put vacuum cleaner and attachments away

... and plans

Plan 0: do 1 - 2 - 3 - 5 in that order. when the dust bag gets full do 4
Plan 3: do any of 3.1, 3.2 or 3.3 in any order depending on which rooms need cleaning

N.B. only the plans denote order

Generating the hierarchy

1 get list of tasks
2 group tasks into higher level tasks
3 decompose lowest level tasks further

Stopping rules
- How do we know when to stop?
- Is “empty the dust bag” simple enough?
- Purpose: expand only relevant tasks
- Motor actions: lowest sensible level

Tasks as explanation

- imagine asking the user the question:
  what are you doing now?
- for the same action the answer may be:
  - typing ctrl-B
  - making a word bold
  - emphasising a word
  - editing a document
  - writing a letter
  - preparing a legal case

Diagrammatic HTA

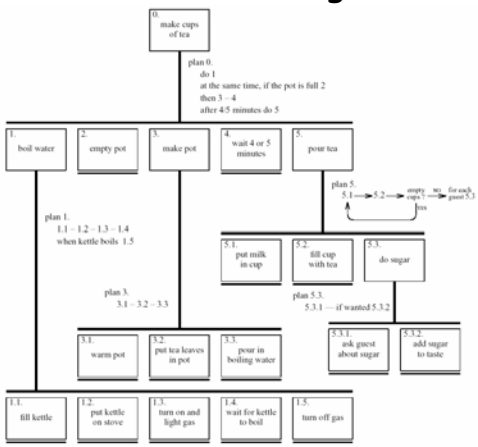
Refining the description

Given initial HTA (textual or diagram)
- How to check / improve it?

Some heuristics:

paired actions	e.g., where is `turn on gas'
restructure	e.g., generate task `make pot'
balance	e.g., is `pour tea' simpler than making pot?
generalise	e.g., make one cup ….. or more

Refined HTA for making tea



Types of plan

fixed sequence	-	1.1 then 1.2 then 1.3
optional tasks	-	if the pot is full 2
wait for events	-	when kettle boils 1.4
cycles	-	do 5.1 5.2 while there are still empty cups
time-sharing	-	do 1; at the same time …
discretionary	-	do any of 3.1, 3.2 or 3.3 in any order
mixtures	-	most plans involve several of the above

Knowledge Based Analyses

Focus on:

Objects – used in task

Actions – performed

\+ Taxonomies –
represent levels of abstraction

Knowledge-Based Example …

```
motor controls
   steering  steering wheel, indicators
   engine/speed
        direct   ignition, accelerator, foot brake
        gearing  clutch, gear stick
   lights
        external  headlights, hazard lights
        internal  courtesy light
   wash/wipe
        wipers   front wipers, rear wipers
        washers  front washers, rear washers
   heating  temperature control, air direction,
            fan, rear screen heater
   parking  hand brake, door lock
   radio  numerous!
```

Task Description Hierarchy

Three types of branch point in taxonomy:

- XOR – normal taxonomy
  object in one and only one branch
- AND – object must be in both
  multiple classifications
- OR – weakest case
  can be in one, many or none

```
wash/wipe AND
     function XOR
            wipe    front wipers, rear wipers
            wash    front washers, rear washers
     position XOR
            front    front wipers, front washers
            rear     rear wipers, rear washers
```


Larger TDH example

```
kitchen item AND
/____shape XOR
/    |____dished  mixing bowl, casserole, saucepan,
/    |            soup bowl, glass
/    |____flat    plate, chopping board, frying pan
/____function OR
     {____preparation    mixing bowl, plate, chopping board
     {____cooking    frying pan, casserole, saucepan
     {____dining XOR
          |____for food   plate, soup bowl, casserole
          |____for drink  glass
```

N.B. '/|{' used for branch types.

More on TDH

Uniqueness rule:

– can the diagram distinguish all objects?

e.g., plate is:

```
kitchen item/shape(flat)/function{preparation,dining(for food)}/
```

nothing else fits this description

Actions have taxonomy too:

```
kitchen job OR
|____ preparation  beating, mixing
|____ cooking frying, boiling, baking
|____ dining  pouring, eating, drinking
```


TDH exercise

- My office has the following – classify them

  Pen, pencil, highlighter pen, overhead projector pen, whiteboard pen, rubber, twink, whiteboard duster, sellotape, stapler, hole punch, scissors, drawing pins, paper clips, bulldog clip

TDH exercise draft answer

desktop equipment
- writing equipment
  - paper writing equipment *(pen, pencil , highlighter pen)*
  - lecture writing equipment *(OHP pen, whiteboard pen)*
- correction equipment *(rubber, twink, whiteboard duster)*
- paper fixing equipment *(sellotape)*
- paper holding equipment *(stapler, drawing pin, paper clip, bulldog clip)*
- paper filing equipment *(hole punch)*
- paper extraction equipment *(scissors)*

Entity-Relationship Techniques

Focus on objects, actions and their relationships

Similar to OO analysis, but …
- includes non-computer entities
- emphasises domain understanding not implementation

Running example

'Vera's Veggies' – a market gardening firm
- owner/manager: Vera Bradshaw
- employees: Sam Gummage and Tony Peagreen
- various tools including a tractor `Fergie'
- two fields and a glasshouse
- new computer controlled irrigation system

Objects

Start with list of objects and classify them:

Concrete objects:
- simple things: spade, plough, glasshouse

Actors:
- *human actors*: Vera, Sam, Tony, the customers
- what about the irrigation controller?

Composite objects:
- *sets*: the team = Vera, Sam, Tony
- *tuples*: tractor may be < Fergie, plough >

Attributes

To the objects add attributes:

Object Pump3 **simple** – irrigation pump
- **Attributes**:
  - status: on/off/faulty
  - capacity: 100 litres/minute

N.B. need not be computationally complete

Actions

List actions and associate with each:
- agent – who performs the actions
- patient – which is changed by the action
- instrument – used to perform action

examples:
- Sam (*agent*) planted (*action*) the leeks (*patient*)
- Tony dug the field *with* the spade (*instrument*)

Actions (ctd)

implicit agents – read behind the words
- `the field was ploughed' – *by whom?*

indirect agency – the real agent?
- `*Vera* programmed the *controller* to irrigate the field'

messages – a special sort of action
- `Vera *told* Sam to ... '

rôles – an agent acts in several rôles
- Vera as *worker* or as *manager*

example – objects and actions

Object Sam **human actor**
Actions:
S1: drive tractor
S2: dig the carrots

Object Vera **human actor**
– the proprietor
Actions: as worker
V1: plant marrow seed
V2: program irrigation controller
Actions: as manager
V3: tell Sam to dig the carrots

Object the men **composite**
Comprises: Sam, Tony

Object glasshouse **simple**
Attribute:
humidity: 0-100%

Object Irrigation Controller
non-human actor
Actions:
IC1: turn on Pump1
IC2: turn on Pump2
IC3: turn on Pump3

Object Marrow **simple**
Actions:
M1: germinate
M2: grow

Events

... when something happens

- performance of action
  'Sam dug the carrots'
- spontaneous events
  'the marrow seed germinated'
  'the humidity drops below 25%'
- timed events
  'at midnight the controller turns on'

Relationships

- object-object
  - social - Sam is subordinate to Vera
  - spatial - pump 3 is in the glasshouse
- action-object
  - agent (listed with object)
  - patient and instrument
- actions and events
  - temporal and causal
    - 'Sam digs the carrots because Vera told him'
- temporal relations
  - use HTA or dialogue notations.
  - show task sequence (normal HTA)
  - show object lifecycle

example – events and relations

Events:
Ev1: humidity drops below 25%
Ev2: midnight

Relations: object-object
location (Pump3, glasshouse)
location (Pump1, Parker's Patch)

Relations: action-object
patient (V3, Sam)
– Vera tells *Sam* to dig
patient (S2, the carrots)
– Sam digs the *carrots* …
instrument (S2, spade)
– … *with* the spade

Relations: action-event

before (V1, M1)
– the marrow must be sown *before* it can germinate

triggers (Ev1, IC3)
– *when* humidity drops below 25%, the controller turns on pump 3

causes (V2, IC1)
– the controller turns on the pump *because* Vera programmed it

Exercise

- Consider the ethnographic observation of someone reading a newspaper.
  - Identify the objects, main attributes and actions which are part of this task.

Exercise answer

Object Reader **human actor**
Actions:
R1: Pick up the paper
R2: Turn page
R3: Locate section
R4: Locate index
R5: Read article

Object Paper **composite**
Comprises: set of sections
Attributes:
indexPoint: (section, page)
Actions:
P1: next section
P2: previous section
P3: goto section
P4: first section
P5: last section

Object section
non-human actor
Attribute:
name: [news| international| business| travel| sport]
Actions:
S1: next page
S2: previous page
S3: goto page
S4: first page
S5: last page

Sources of Information

Documentation
- N.B. manuals say what is *supposed* to happen but, good for key words and prompting interviews

Observation
- formal/informal, laboratory/field (see Chapter 9)

Interviews
- the expert: manager or worker? (ask both!)

Early analysis

Extraction from transcripts
- list nouns (objects) and verbs (actions)
- beware technical language and context: `the rain poured' vs. `I poured the tea'

Sorting and classifying
- grouping or arranging words on cards
- ranking objects/actions for task relevance (see ch. 9)
- use commercial outliner

Iterative process:

data sources can point to further analysis

… but costly, so use cheap sources where available

Uses – manuals & documentation

Conceptual Manual
- from knowledge or entity–relations based analysis
- good for open ended tasks

Procedural 'How to do it' Manual
- from HTA description
- good for novices
- assumes all tasks known

To make cups of tea

boil water — see page 2
empty pot
make pot — see page 3
wait 4 or 5 minutes
pour tea — see page 4

— page 1 —

Make pot of tea
once water has boiled

warm pot
put tea leaves in pot
pour in boiling water

— page 3 —

Uses – requirements & design

Requirements capture and systems design
- lifts focus from system to use
- suggests candidates for automation
- uncovers user's conceptual model

Detailed interface design
- taxonomies suggest menu layout
- object/action lists suggest interface objects
- task frequency guides default choices
- existing task sequences guide dialogue design

NOTE. task analysis is never complete
- rigid task based design ⇒ inflexible system