
21. USER-CENTERED DESIGN OF HYPERTEXT/HYPERMEDIA FOR EDUCATION

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21.1 WHAT IS HYPERTEXT; WHAT IS HYPERMEDIA?

The prefix *hyper* usually means “more than,” so we may begin by asking what is it that hypertext has that makes it more than text (see 24.6.1). The simple answer to this is that as well as text, hypertext has “links.” The text is usually organized into chunks, units, or “nodes,” as they have come to be known, and the links form connections between certain nodes.

There are no “rules” about how big a node should be or what it should contain. Similarly there are no rules governing what gets linked to what. Hence, there can be many different kinds of hypertext in the same way that there are many different kinds of text. Furthermore, hypertext allows the concept of “document” to be extended since, logically, entire documents can be treated as nodes and linked together to form a single hypertext.

The concept of links between units of information has a history almost as old as writing itself. Think of a footnote marker in a text: It links the main text with the footnote text, although in this case the marker is a static link—the reader must make the movement between text and footnote. In hypertext, the links are active: Selecting the link moves the reader to the linked text in some way. It is this dynamic aspect of presentation that is the principal difference between text and hypertext. An alternative term for hypertext which never gained the same currency was *interactive documentation* (Brown, 1986), and a recent paper used the term *responsive text* (Hillinger, 1990).

If hypertext isn't a new idea, why has it recently become so popular? In fact, hypertext has been an idea waiting for technology to catch up with it. In order to implement active links, it is necessary to use a dynamic display medium such as a computer screen. Hence, in the 1960s in the research laboratories, several groups started using large mainframe computers in order to explore the potential of hypertext. Advances in computer technology have led to the development of the minicomputer and the microcomputer, making considerable

computer power available to the individual user: the personal computer with so-called “user friendly” interfaces. On such computers, “popular” hypertext becomes feasible.

Hypermedia is presented as a further development of hypertext. As computers have moved from being able to present little more than uppercase text to being able to present information in a variety of communication media—sound, graphics, video—so it is possible to link these media together using hypertext techniques, hence the term *hypermedia*. However, in the same way that a book can contain text, drawings, tables, photographs, or even pop-up models, so the distinction between hypertext and hypermedia is somewhat arbitrary. We will use either term to refer to a set of nodes of information that are dynamically linked.

By way of example, consider how information relating to the European Union (EU) could be presented. At the top level, the reader could be presented with a map of Europe and then be able to select various aspects of the EU or any particular member state for more information (see Fig. 21-1). This may take the form of a more detailed map showing the major cities that, when selected, showed some information about the city. Alternatively, the reader may be offered other information about the country, such as the currency, culture, audioclips of common words in the language such as *please* and *thank you*, and so forth (see Figure 21-2). The city maps could offer sites of interest such as museums, local transport details, entertainment sites such as theaters, or even restaurants and pubs; they could include videoclips of the major tourist sites, on the beach or at the disco. Now the tourist “brochures” can feature live action and be interactive in a way that the present printed chapter cannot.

21.2 THE GENESIS OF HYPERTEXT

We do not intend this section to be a general overview of everything that has gone before. The reader who is interested in such a description would do well to read Jeff Conklin's

excellent review (Conklin, 1987), followed by Jakob Nielsen's popular book (Nielsen, 1990). Rather, we would like to present some of the historical highlights as being representative of three different conceptual stances, and we represent each of these by an influential figure in the field. These are:

- The human being as possessor of a cognitive system based on association: the view of Vannevar Bush
- Technology as an augments of the human intellect: the personal philosophy of Doug Engelbart
- The need for a flexible and usable access mechanism to the world of interrelated information: the dream of Ted Nelson

The article most often cited as the modern birthplace of hypertext is Vannevar Bush's "As We May Think" (Bush, 1945). Bush was appointed the first director of the Office of Scientific Research and Development by President Roosevelt in 1941. He saw clearly the problems associated with the ever-increasing volumes of information that were the product of the Second World War research and technology initiatives:

There is a growing mountain of research. But there is increased evidence that we are being bogged down today as

specialization extends. The investigator is staggered by the findings and conclusions of thousands of other workers—conclusions which he cannot find time to grasp, much less to remember, as they appear. Yet specialization becomes increasingly necessary for progress, and the effort to bridge between disciplines is correspondingly superficial.

It surprises many people to learn that this statement was made 50 years ago—the information explosion is not such a modern phenomenon after all! To cope with this plethora of information, Bush conceived the *memex*, a device "... in which an individual stores his books, records, and communications, and which is mechanized so that it may be consulted with exceeding speed and flexibility." More than a simple repository, the memex was based on the principle of association, the notion that all facts, concepts, and ideas are linked in the mind, and that any one knowledge chunk can act as a stimulus or trigger to remember another.

In devising a supporting technology of this kind, Bush sought to create a means of information storage and retrieval that was intuitive to the user by virtue of its similarity to the workings of the mind. The appeal to intuitive operation pre-dates many of the arguments that have subsequently emerged in the design of information technology. For Bush, it was suffi-

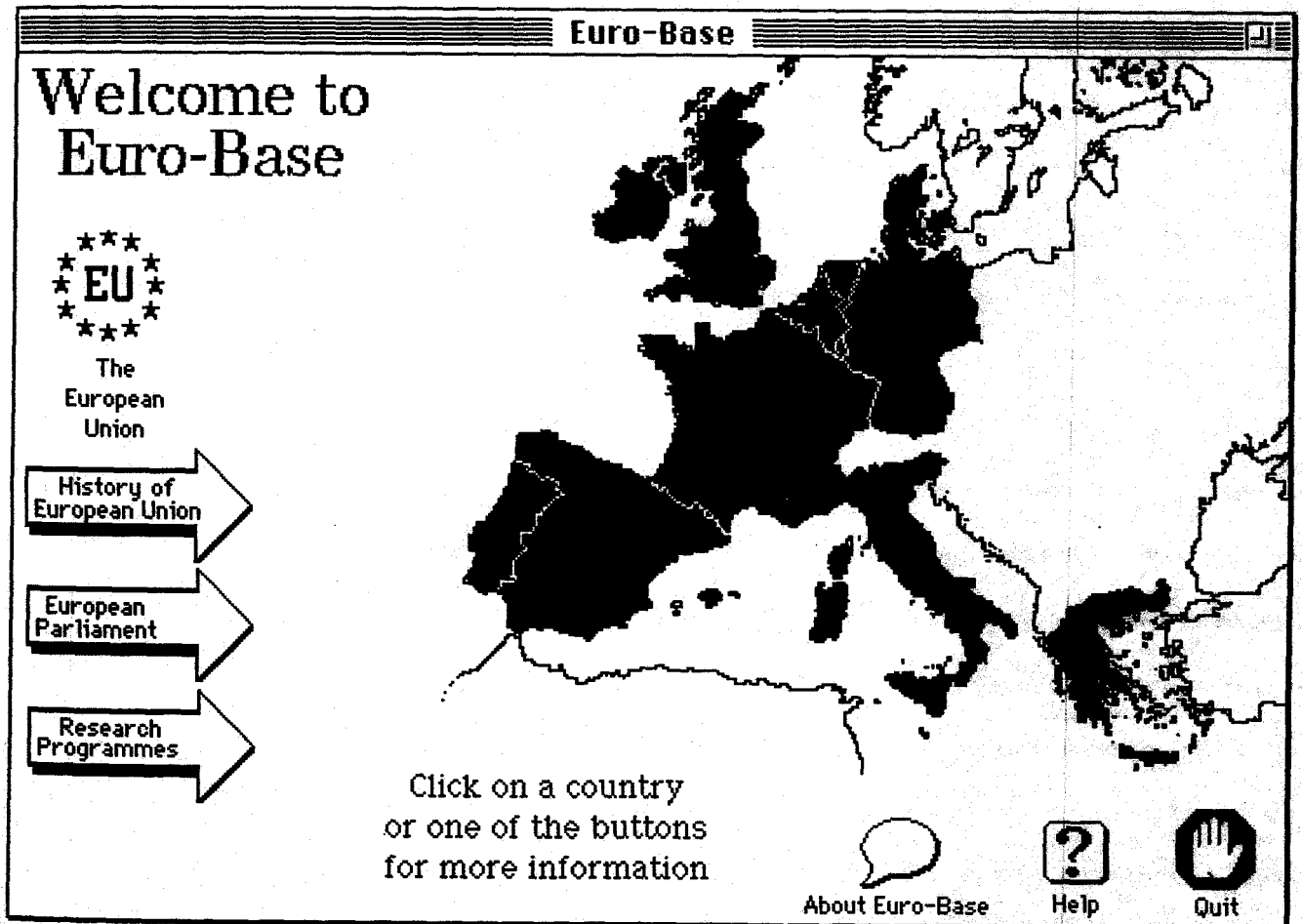


Figure 21-1. The top level of the Euro-Base hypertext, a wealth of information at the click of a button.

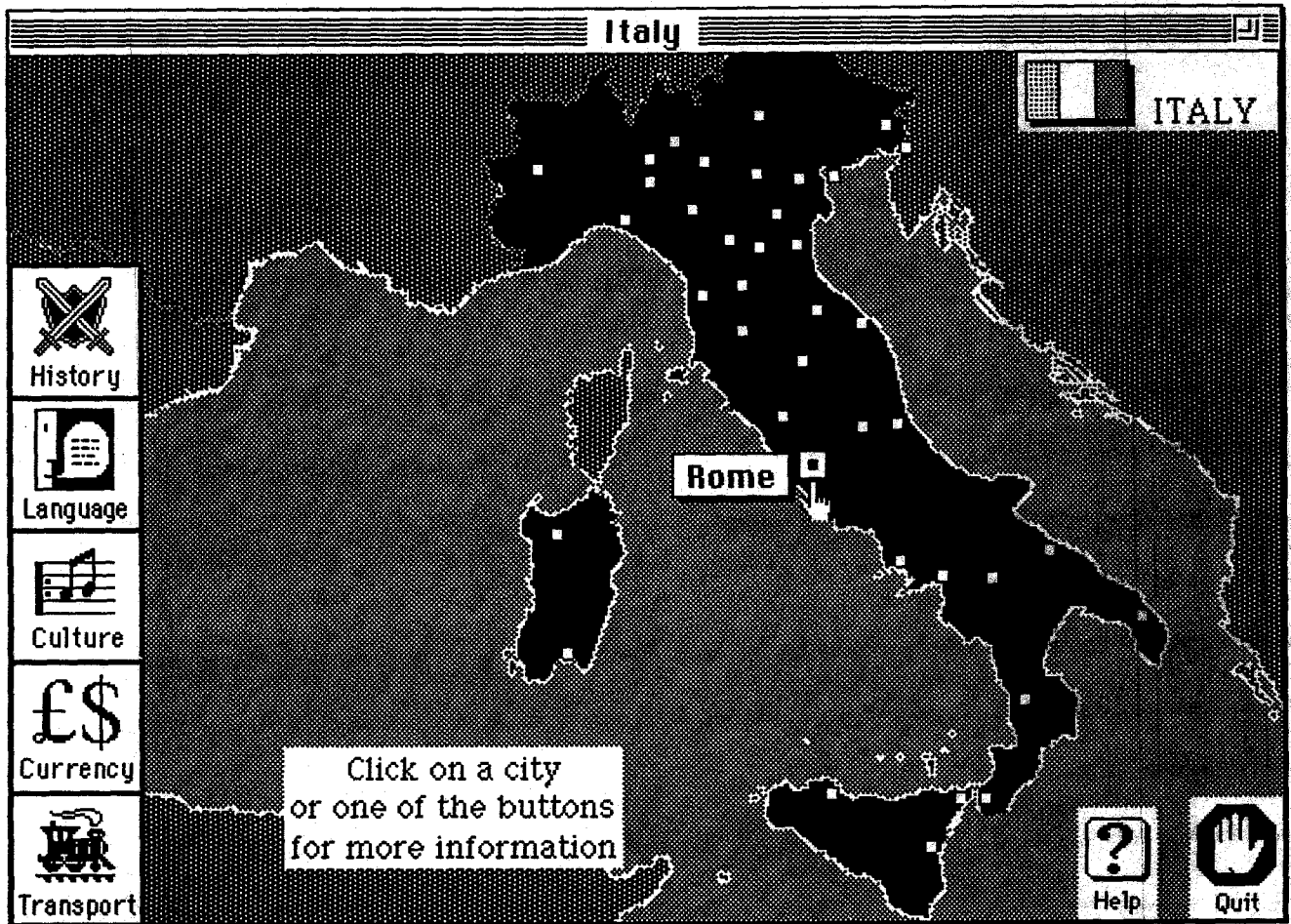


Figure 21-2. See and hear the sights and sounds of Europe.

cient that a principle such as association—at that time a current view of the human cognitive system—would satisfy the organizational requirements of information users, an approach to design that is also neatly mirrored in current human factors thinking. However, given the volume of information a person might need to handle and what we now know about the vagaries of human association (e.g., Howe, 1980), it appears unlikely to us that such a principle alone could act as a sufficient design constraint on a hypermedia system.

These objections aside, it is interesting that Bush viewed the need for system design in such a user-centered manner. Unfortunately, the technology of the day was not as developed as the ideas: Bush conceived of the memex as being microfilm based. Hence, his ideas lay dormant for at least 2 decades, waiting for the technology to catch up. However, it is still commonplace to hear hypertext spoken of as a “natural” information system and a viable model of the human mind.

Whereas Bush (and others) sought to devise systems based on cognitive equivalence, Doug Engelbart has been developing his conception of hypertext since the early 1960s by placing his emphasis on the augmenting or amplifying of human intellect (cf. Engelbart, 1963), as reflected in the naming of his system as *Augment*. Engelbart’s first implementation was NLS (oN Line System), which was

meant as an environment to serve the working needs of his Augmented Human Intellect Research Center at Stanford Research Institute. This was a computer-based environment containing all the documents, memos, notes, reports, and so forth, in addition to supporting planning, debugging, and communication. As such, NLS can be seen as one of the earliest attempts to provide a hypertext environment in which computer-supported collaborative work (CSCW) could take place.

Engelbart’s pragmatic position is less concerned with modeling the information-processing tendencies of the human being than with extending them, although to some extent such a position is logically determined by an image of the mind that one is trying to enhance or augment. In conceptualizing the technology in this way, Engelbart espoused the notion of hypertext as some form of cognitive artifact, extending the capabilities of the human being and offering the potential to attain performance levels in information tasks which would be difficult or impossible to achieve without hypertext. This is not dissimilar to McLuhan’s ideas of technologies as extensions of human faculties, for example, wheels as an extension of legs (McLuhan, 1964), ideas that had their own philosophical roots in the “personal knowledge” work of Michael Polanyi (1957).

The actual term *hypertext* is attributed to Ted Nelson, who called his dream system *Xanadu*—a “docuverse” in which the entire literature of the world is linked, a “universal instantaneous hypertext publishing network” (Nelson, 1988). In *Xanadu* nothing ever needs to be written twice; a document is built up of original, or *native*, bytes and bytes that are *transclusions*, a term that implies the transfer and inclusion of part of one document into another. However, an important aspect of *Xanadu* is that the transclusion is virtual, with each document containing links to the original document rather than to copies of its parts.

While Nelson’s view may appear to be the most ambitious, in many ways his advocacy of this form of system is the most realistic, since it rests less on contemporary assumptions drawn from the psychological theories of the day and more on the requirement for a technology to provide rapid, easy access to the world of information. At an abstract level, the World Wide Web developed by Tim Berners-Lee and colleagues at CERN (Berners-Lee et al., 1994) comes close to realizing Nelson’s dream, since it allows links between documents anywhere in the world (or at least anywhere with a connection to the Internet).¹ Indeed, this may be the route through which some of the ideas behind *Xanadu* will now be instantiated. When Autodesk, the CAD company, purchased *Xanadu* in 1988, there was hope that an actual product would be developed. However, 5 years and reputedly \$5 million later, Autodesk has abandoned the project, and the *Xanadu* name is back with Nelson who, at the Hypertext ’93 conference, was talking about “*Xanadu Light*” based on existing tools such as Gopher and Telnet.

The three views represented here are not mutually exclusive; it is possible to advocate a hypertext system that provides ready access to all information and therefore allows users to perform new tasks. Indeed, there is a fine line between these idealized positions, and it is not possible, or indeed very useful, to describe any particular contemporary system (or system designer’s viewpoint) in terms of one or any of them. However, the fact that different views can proliferate illustrates the point that *hypertext* is not a unitary concept, not a single thing that can be defined any more precisely than in terms of nodes and links. It is for this reason that hypertext software packages with completely different “look and feel” (cf. Guide and HyperCard) can be produced and still claim to embody the concept of hypertext.

The corollary to this is that we should not expect any particular hypertext system to be ideal in all task situations. It is not surprising that Conklin’s (1987) historical survey of hypertext systems groups them in a largely task-based way. He uses four categories: macroliterary systems, which center

on the integration and ready accessibility of large volumes of information; problem exploration systems, which are designed to allow the interactive manipulation of information; systems for structured reading/browsing/reference; and, finally, systems that might have been applied to a specific application but whose real purpose in construction had been the experimental investigation of hypertext technology itself.

As we shall attempt to demonstrate here, the pedagogic implications of hypertext rest on a mixture of these three underlying philosophies. However, a major weakness of the field has been the inadequate theoretical explication of the nature of learning that hypertext systems might support. In particular, an oversimplistic acceptance of the naturalistic argument advocated by Bush remains, even if the models of the mind subscribed to by contemporary learning theorists (e.g., Greeno et al., 1978) are more sophisticated than the principle of association current in Bush’s time. Consequently, the field lacks a dominant theoretical perspective that can draw on significant empirical support, and much of the literature in the field is rhetorical in style, reflecting the preparadigmatic nature of the field.

21.3 HYPERTEXT AND LEARNING

For over 40 years, technological “solutions” have been offered to the teaching profession in order to improve their effectiveness, ranging from programmed text and teaching machines through to the modern fascination with computers. Areas such as computer-based learning (CBL) or computer-aided instruction (CAI) aim to provide some of the functions of the teacher (see 2.3.2, 12.1, 19.2.2). The technologist’s dream, of course, was the provision of a workstation for every learner so that they may proceed at their own pace, and to some extent the dream remains today. However, between the earliest teaching machines and the latest hypermedia environments, there has been a radical shift in prevailing pedagogy, from the repetitive reinforcement schedules of the behaviorists through the cognitivist movement and latterly the constructivists. Each movement has sought to make the technology its own and can make a case for the use of hypertext in its own terms (see 2.2.1, 5.5, Chapter 7).

It is not our intention to expound these arguments here. Suffice it to say that few theorists of any philosophical persuasion within the learning discipline have been able to specify a distinctive learning environment within the technology that uniquely supports their position. Indeed, critics of the old behaviorist teaching machines characterized the technology as betraying a crude, mechanistic model of learning where teaching reduces simply to optimizing the presentation of material—a criticism not lessened in any way by improvements in technology per se.

Within education, hypertext has been seen by some as a valuable new constructivist tool (see 7.1) for supporting teachers and students (Cunningham, Duffy & Knuth, 1993), whereas others have seen it as simply a fancy new “jug” (Whalley, 1993). There is merit in both positions, but

¹ At the detailed level, there are still numerous important differences between *Xanadu* and the World Wide Web, the former including consideration of, for example, copyright payment, storage and usage charging, addressing to the character level, typed links, and, of course, transclusions.

for us the crucial point is that the argument is currently showing no sign of resolution, since neither side's claims have been subjected to sufficient empirical testing.

The perceived advantages of hypertext as an educational medium are usually ascribed to its nonlinear property. This is often contrasted with the assumed linearity of traditional text, for example: "In contrast [to hypertext] most standard text documents are constructed to be read *linearly*, from beginning page to ending page" (van den Berg & Watt, 1991, p. 118).

We have discussed the myth of linear text at length elsewhere (McKnight, Dillon & Richardson, 1991). Suffice it to say that most texts are *not* constructed to be read from beginning to end. This becomes blatantly obvious after the briefest of observations of people using "standard" text documents—e.g., journal articles, course textbooks, encyclopedias, and newspapers. How are you reading the book you are holding? Did you reach this page after reading all the preceding pages, or did you browse the contents and flick through and glance at some chapters before deciding which to read now? Even within this chapter, you may have glanced at the references first (have we referred to your work?), skipped sections (maybe you are not interested in the historical roots of *hypertext*), and so forth. Apart from the novel, very few texts are constructed to be read linearly in their entirety. As we have pointed out elsewhere, even the novel may be used in many nonlinear ways in, say, a literature class in tertiary education (Dillon & McKnight, 1990).

Hypertext has certainly become a popular term to be bandied about in education, not surprisingly since it is relatively new, technically impressive, and, until the novelty wears off, often fun to use. A brief search of the literature from 1989 to 1993, using the search terms *hypertext* OR *hypermedia* AND *learning* will yield over 100 references. The issues covered and the disciplines and journals represented are many: using multimedia with Navajo children to alleviate problems of cultural learning style, in *Reading and Writing Quarterly*; monitoring hypertext users, in *Interacting with Computers*; hypertext in cognate-language learning, in the *Journal of Computer Assisted Learning*; opportunities for hypertext in interactive learning, in the *Journal of the American Society for Information Science*.²

Unfortunately for present purposes, very few of these report on the systematic evaluation of hypertext in an educational setting. By *systematic evaluation*, we mean the empirical testing of real users interacting with the artifact in an ecologically valid task. The vast majority either say how wonderful hypertext is or might be, or describe some hypertext-based courseware in detail without evaluating its effectiveness. Some even equate Apple's HyperCard with hypertext, assuming that if it is built in the former, it must

be an example of the latter (e.g., Horton, Boone & Lovitt, 1990). Although these authors do perform an evaluation, their results provide evidence for computer-aided instruction rather than hypertext.

One of the earliest attempts to evaluate hypertext's potential in a learning environment was that reported by Beeman et al. (1987). Their paper reports on attempts to use the Intermedia hypertext system in two of Brown University's existing courses—an English literature course and a plant cell biology course. The evaluation of the effect of introducing hypertext was far from easy. Each of the courses was closely observed by a team of social scientists, once prior to the introduction of the hypertext and once when the hypertext materials were in use. Instructors and students were interviewed several times throughout the evaluation; a group of students was asked to keep diaries of their activities during the time the courses were taught; and the use of a specially set up computer laboratory by both students and instructors was monitored.

At first sight the effects of introducing hypertext seem to have been positive. Beeman et al. report a small positive correlation ($r = 0.29$ at 0.05 level of confidence) between high Intermedia use and high grades. However, they also report an unexpected finding that suggests that improvements may not have been attributable to the introduction of hypertext per se, but rather to factors related to its introduction. Because the Intermedia workstations were not ready in time, the professor in charge of the English course was forced to teach the course without using the system but having already prepared the Intermedia material. The result of this was that he changed the way he taught the course and subsequently felt that students grasped "pluralistic" reasoning styles better than in previous years. Furthermore, the students were more satisfied with the course than in previous years. This suggests that the need to rethink the course design may have been the major contributor to the improvement in grades. A professor who has taught the same course for years may not be as "inspiring" as he used to be, but interest may well be rekindled and communicated to the students by having to redesign the course for a new medium.

A further difficulty in making any strong statements about the apparent improvements in grades is also raised by Beeman. By themselves, the studies offer no evidence that the style of thinking fostered in these two courses transfers to other courses. As Beeman points out, students are generally good at adapting to teachers because they are interested in doing well. Hence, their results may indicate a course-specific adaptation rather than a genuine change in thinking style. However, it would be extremely difficult to test such an hypothesis, since it would involve the comparative evaluation of students across many courses.

The Beeman studies are an excellent illustration of the difficulties involved in assessing the effect of introducing not only hypertext but any new teaching technique or technology into an educational context. The Hawthorne effect, so-called because of the industrial context in which it was first *systematically* observed, is just as likely to appear in an

² Note that we are not concerned here with information retrieval from hypertext, a topic large enough to merit a separate chapter. The reader interested in exploring this topic is referred to Smeaton (1991) as a convenient starting point.

educational setting. Furthermore, Beeman's most interesting conclusion was that the significant learning effects observed through the use of Intermedia were more pronounced for the people involved in producing the materials rather than for students using the system, apparently substantiating the adage that "the best way to learn something is to teach it!"

Despite the topic of learning having formed a major section of psychology for many years, we still know very little about the cognitive processes of learning. As psychologists we recognize this as a parlous state of affairs, since many people recognize the ability to learn as a key attribute of human behavior. From the outset, psychology has sought to define, explain, and predict learning, from associative principles to laws of effect, from principles of reinforcement to cognitive skill acquisition, from mental model acquisition to constructivism. However, as Norman (1980) states boldly, "it has all come to nought." Learning, once the backbone of psychology, is now rarely found as a major component of psychology degrees but resides in specialized subdisciplines such as education. While this might be interpreted as a position of strength engendered by the subject's inherent importance, such a position is hard to justify in the absence of similar developments for other major psychological issues such as thinking, memory, perception, social interaction, and so forth. In effect, 100 years of studying learning has provided little by way of systematic knowledge for ensuring desirable learning outcomes. Hence, evaluating the interactive technology to support this process is by no means straightforward.

Hammond (1989) claims that we seem to be good at providing some appropriate environments for learning:

... in teaching a child to talk, the parent merely needs to give appropriate stimulation at appropriate times; details of intermediate states of knowledge and the processes of acquisition can safely be left to the child and to the research psychologist (p. 172).

This comment is telling in that it suggests that "merely" providing the appropriate stimulation at the right time might have the desired results (a rather Skinnerian perspective for such a cognitivist to take, though with obvious Chomskian resonance!), with the learners themselves doing the rest. If this really is the best we can do, then psychology's role is less to worry about the nature of learning than to concentrate on the provision of suitable environments... and hypertext may be one such environment.

Hammond and Allinson (1989) suggest that hypertext can provide the basis for an exploratory learning system, but that by itself it is insufficient, needing to be supplemented by more directed guidance and access mechanisms. In order to investigate this suggestion, they conducted an experiment in which all subjects used the same material held in a hypertext form, but with differing guidance and access facilities available. The baseline group had a basic hypertext with no additional facilities, while other groups had either a map or index or guided tours available, and a final group had all three facilities (map, index, tours) available. Half of the sub-

jects were given a series of questions to answer while accessing the material (a directed task), while the other half were instructed to make use of the material to prepare for a subsequent multiple-choice test (an exploratory task).

Perhaps surprisingly, Hammond and Allinson report no reliable differences between task conditions for the three groups, which had a single additional facility, although in all three groups the facilities were used to a substantial extent. However, in the group having all three facilities available, there was a significant task-by-facility interaction. Those subjects performing the exploratory task made little use of the index but significant use of the tours, while those performing the directed task made little use of the tours and far more use of the index. Thus, Hammond and Allinson argue that after only 20 minutes, subjects were able to employ the facilities in a task-directed manner.

The additional facilities also allowed more accurate overviews of the available material and resulted in a higher rate of exposure to new rather than repeated information. However, there were no significant differences in task performance between groups. Hammond and Allinson attribute this lack of difference to the fact that neither of the tasks required any strategic organization of the material, and they therefore caution against extrapolating such results to situations other than simple rote learning of relatively unstructured material. Indeed, even the subjective judgments of the subjects—that the system was easy to use, getting lost was not a major problem, and the system was rated as "better than a book"—should be viewed in the light of the fact that the hypertext used was very small (consisting of only 39 information screens), and subjects only used the system for a maximum of 20 minutes. Although it discusses "learning support environments" and is clearly aimed at an educational context, Hammond and Allinson's work provides a contrast to the Beeman study in that its strength is its controlled, experimental nature, whereas the strength of Beeman's work is its applied, "real world" nature. Both types of study have a role to play in the attempt to discover the effects of hypertext in education.

Stanton and Stammers (1990) suggest that the reasons why a nonlinear environment might be superior are that it (a) allows for different levels of prior knowledge, (b) encourages exploration, (c) enables subjects to see a subtask as part of the whole task, and (d) allows subjects to adapt material to their own learning style. In their experiments (1989, 1990), one set of subjects was given the freedom to access a set of training modules in any order, while another set of subjects was presented with the modules in a fixed order. They reported that performance was significantly improved when subjects trained in the nonlinear condition. Although such comparisons may provide valid experimental designs, extrapolating the results to realistic learning situations is difficult, particularly in higher education where students are rarely forced to access material in a rigid, predetermined order. Hence, the results may reflect the advantage not so much of nonlinear environments but rather of giving the learner some degree of control over the learning environment—a return to the more straightforward

notion of providing accessible material and letting the learners "get on with it" themselves.

It could be argued that a hypertext environment does provide for greater learner control and therefore possesses advantages over traditional paper-based learning materials. However, this suggests two equally plausible interpretations: greater control over the user's access to the hypertext's contents by way of the links provided by the author/designer, or greater control by users because they are free to follow the pathways of their choice—an option that is allegedly more difficult with printed text. The second option seems more optimistic and attractive, but experience does not give much encouragement. Given the option of following their own path through a hypertext courseware or taking a path suggested by the tutor, how many are likely to follow their own inclinations? Furthermore, how many tutors would put as much energy into generating paths through the hypertext which support a stance antithetical to their own? Students using hypertext courseware will tend to follow the paths provided by the course tutor or hypertext author. If either of these possibilities is true, then a hypertext courseware may prove more constraining than the books it replaces, which can be opened at any page.

In principle, the whole of a book or journal volume is available to the reader simply by turning page after page, whereas in hypertext, the learner is at the mercy of the author, reliant on his having provided suitable links (see 12.2.3.5.4). Even if learners are given the facility to add their own links, they must have seen the nodes at both ends of the link in order to make the judgment that a link is desirable. This makes the process of adding links seem a little more "hit-and-miss" than it is usually described.

Although the notion of control is an important one in education, it is far from clear that hypertext provides the learner with more control than traditional media. While Duchastel (1988) states that computers promote interaction through a manipulative style of learning where the student reacts to the information presented, the fact that the learner is using a mouse to select items and move through the information space does not make the process any more "active" than consulting an index, turning the pages of a book, underlining passages, and writing notes in the margin. In the main part, interactivity in education comes, as it has done for over 2,000 years, from verbal discourse.

If current hypertext systems appear to provide greater opportunities for learner control and best support exploratory styles of learning, this may in part explain the excessive zeal among their proponents for the importance of these aspects of learning. Romiszowski (1990) provides a welcome degree of caution:

There is, however, some doubt as to whether all these process-oriented aspects of hypertext systems are necessarily "a good thing" in all manner of learning situations. The research on learner control of the learning process is, to say the least, mixed. There is much evidence to suggest that learners, when free to select their own strategies, do not always select wisely" (p. 322).

This echoes earlier suggestions that the majority of students are not able to set learning objectives for themselves and study autonomously (Bunderson, 1974; O'Shea & Self, 1983). Many undergraduate programs start with study skill courses.

A heavy emphasis on exploratory learning for younger students may soon, if not already, be seen as yet another progressive enthusiasm that flowered in the 1960s. Today it is more likely to be seen as just one useful tool in the teacher's armory—perhaps a stimulus and motivator to be used at regular intervals between sessions of more structured classwork.

At the other end of the student age spectrum, access to a wide-ranging and richly interconnected hypermedia database may be of real interest to, say, the fledgling humanities Ph.D. candidate who is trying to identify common factors that have influenced a diverse range of human activities. The term *fledgling* is used intentionally, since who else will incorporate primary documents that are accessed so very rarely (unless thesis requirements are changed to dictate that all referenced material is incorporated into the hypertext "canon"!) Undergraduates will probably still feel so overwhelmed by the extent of their workload that following associative flights of fancy, rather than sticking to the prescribed texts of the reading list, will seem at best a luxury if not sheer folly. As Whalley (1990) points out: "The hypertext reader might flit between the trees with greater ease and yet still not perceive the shape of the wood any better than before."

The scientific principle of parsimony, of adopting the most simple explanation, is worth applying to learning and the new media. "Pluralistic reasoning" to some is "confused thinking" to others, and given the far-from-certain results of much cognitive psychological work on mental representations and knowledge construction, as well as the ongoing revisionism in the educational field, we might best consider hypertext as an information-accessing medium and the learner as a seeker of information before positing elaborate notions of thinking style that prove difficult to validate empirically.

Adopting such a perspective allows us to shift our concern from theorizing about the mental activity of learning to designing an information environment that can support task performance. We will return to this point later, but before outlining an approach that could help improve the design of hypertexts, we will review some of the studies that have actually attempted, with varying degrees of success, to evaluate hypertext systems in an educational context.

In a study by Gordon and Lewis (1992), 80 subjects read a tutorial about a state-of-the-art hi-fi videocassette recorder in either a linear format or one of two hypertext formats (unconstrained network or constrained structure). They were then asked to summarize the tutorial, answer a series of questions, and solve two problems using the hi-fi VCR to perform particular tasks. For the factual questions, subjects using the linear form of the information scored significantly higher than either of the hypertext groups, which did not differ from each other. For the problem-solving tasks, subjects using the constrained hypertext performed equivalently to the linear subject, with the free network

subjects performing significantly worse. The authors conclude that: "If it is critical that students learn the details of material in a document, the instructor cannot rely on the student to hypertext [sic] through the information and acquire it; linear formats should probably be retained" (p. 307). It is a pity that these authors did not include a condition in which subjects used the traditional paper manual.

A study by Higgins and Boone (1990) compared the effectiveness of a hypertext study guide used either in combination with or instead of lectures. Forty ninth-grade students (mean age 14.6 years) enrolled in a course in Washington State history took part. Of the 40, there were 10 with learning disabilities, 15 remedial students, and 15 regular students. They were randomly allocated to the three conditions of (1) lecture alone, (2) lecture plus study guide, and (3) study guide alone. Their results led them to conclude that "The hypertext computer study guide is as effective an instructional medium for students with learning disabilities, remedial students, and regular education students as a well-prepared lecture, as measured by recall and retention of information both factual and inferential" (p. 539). They drew identical conclusions for the combination of study guide and lecture and suggested that the study guide could provide some students with the practice necessary to increase quiz performance. Strangely, the authors appear not to have considered subjective preference. If there was not much to choose between them in terms of outcome, then the more attractive system has a major advantage in terms of student motivation, especially with less able students.

Despite our criticism above of van den Berg and Watt's (1991) view of text linearity, the study reported in their paper is worthy of consideration. In a design similar to that of Higgins and Boone (1990), they compared the effectiveness of a hypertext document containing material on introductory statistics and hypothesis testing. In a "competitive" condition, a random sample of 28 students used the hypertext during a 6-week period when they did not attend lectures, while the remaining 81 students continued to attend lectures. In a "supplementary" condition, 30 randomly selected students were given the hypertext to use at their discretion, while the remaining 72 were not allowed access to it. In the "replacement" condition, the hypertext served as the sole source of instruction, and there were no accompanying lectures. These conditions were run over three consecutive semesters; subjects were senior-level communications sciences majors.

Interestingly, although there were no significant differences in the objective performances of the groups, the subjective acceptance of hypertext was highest in the supplementary condition and lowest in the competitive condition. The authors suggest that subjects in the competitive condition may have been influenced by the contrast between being left to their own devices compared with the guidance they perceived the control group receiving. They conclude that the most suitable use for hypertext might be as a replacement for in-person instruction where teaching is not available.

Jonassen, one of the most prolific of authors in the field of hypertext and learning, recently reported on a series of

three studies attempting to evaluate hypertext (Jonassen, 1993). In terms of structural knowledge acquisition, Jonassen was forced to conclude that his results called into question "the ability of learners to engage in meaningful learning rather than information retrieval from hypertext, especially in the context of a learning environment" (p. 165). Far from being the "natural" learning environment that somehow reflects semantic memory, Jonassen suggests that "A fair evaluation of learning from hypertext can only come from hypertext-literate learners who have developed a useful set of strategies for navigating and integrating information from hypertext" (p. 165).

Marchionini and Shneiderman (1988) have suggested that hypertext is more suited to browsing than directed retrieval tasks. Following from this suggestion, Jones (1989) hypothesized that more incidental learning would occur in a browsing task than in a task requiring the use of an index. The argument advanced by Jones was that the links in a hypertext node represent an embedded menu and that the context provided by the node should encourage the connection of the ideas at either end of the link. In other words, the learner's semantic net is more likely to be elaborated or more learning is likely to occur.

Two groups of subjects were used in Jones's experiment. Both groups used the same hypertext database, but one group was shown how to browse through the information using the links and were explicitly instructed not to use the index, while the other group were instructed in the use of the index and were not informed about the active nature of the highlighted words on screen (which were described to them as "clues to other index entries"). Subjects were given 5 questions to answer from the database, but afterwards were given 10 questions to measure incidental learning.

Although Jones's argument has intuitive appeal, her experiment failed to support her hypothesis. No significant differences were observed in terms of performance on the incidental learning questions. It is possible that the nature of the questions given to the subjects to answer from the database did not encourage incidental learning. This is certainly suggested by the low overall success level of subjects on the incidental learning test—the *highest* mean number correct for any group was 1.56. Even in the five target questions, taking all groups together, no question was answered correctly by more than half of the subjects. This suggests that the task was not particularly sensitive to the effect of the experimental manipulations, and hence we can do little more than agree with Jones that "much more research is needed."

In total, these studies illustrate the problems that befall most evaluations of hypertext in education: difficulties in controlled experimentation, difficulties in finding ecologically valid tasks, difficulties in describing process and difficulties of defining—let alone measuring—the outcomes of learning. Marchionini (1990) sums it up: "The essential problem of evaluating highly interactive systems is in measuring both the quality of the interaction as well as the product of learning. Evaluations of hypermedia-based learning must address the process of learning and the outcomes of learning" (p. 20.6).

If there has been inadequate evaluation of the hypertext systems that have been implemented, does this prevent the design of a new generation of improved hypertext systems? We answer this question both Yes and No! There can be no possibility of progress without reliable and convincing evaluation, but there are certain established ways to improve the design of the initial system. These are the views underlying user-centered system design and the view of hypertexts and their users as one form of system.

21.4 USER-CENTERED DESIGN

User-centered design has emerged as the prevalent technological design philosophy (see 12.4.1) in recent years in response to an increased awareness that interactive computer-based systems often failed to achieve the goals of their designers, especially in relation to user requirements and consequently user satisfaction. The conceptual theory has been recast in more operational terms as enhancing a system or product's "usability" with measurable objectives such as speed of learning, reduction in error, task efficiency, and effectiveness in and reduction in need of support requirements.

To understand the usability issues underlying hypertext, it is helpful to conceptualize the system in terms of four basic factors: the users, their tasks, the information space in which the task is being performed, and the environment or context in which all these interact.

21.4.1 The Users

Users vary tremendously in terms of the skills, habits, intentions, and numerous other attributes that they bring to the computer when interacting with hypertext. Information technology's rapid development over the last decade and its penetration into almost every sphere of human activity has raised new challenges in terms of design assumptions. It can no longer be assumed that users will be trained computer scientists or IT professionals who have experience of a wide range of systems or applications. User interfaces, particularly in educational and public access applications, must be designed with the assumption that some users may well bring no previous computing knowledge with them to the interface. Since contemporary thinking rightly stresses that technology should be designed with the users' needs in mind, an essential first stage of user-centered design methods is the analysis of users' skills and requirements.

21.4.2 The Tasks

The tasks that can be performed with documents are also extremely variable. People read texts for pleasure, to solve problems, to stimulate ideas, or to monitor developments, for example. Since such interactions also vary widely in terms of time, effort, and skill involved, then when we consider the development of a new information presentation medium, we must also determine the nature of the tasks it is intended to

support if we are to avoid catch-all phrases or claims such as "hypermedia is better than paper."

21.4.3 The Information Space

These first two terms are relatively self-explanatory, but *information space* is a more vague term, by which is meant the document, database, texts, and so forth on which the user works (see 26.5.2). An information space could therefore be as small as a single text fragment or as large as an on-line database, national archive, or university library. It is the presence of a boundary rather than the size or number of items which defines the concept. The information spaces currently in existence are numerous (just think of all the types of documents that are available in the paper domain), but these are likely to be overrun with new forms of information space in the hypermedia world when graphics, sound, video, and immersive graphics eventually appear. Information type can be shown to interact with both users and tasks; i.e., people utilize information differently depending on its type, their experience, and what they want from it (Dillon et al., 1989).

21.4.4 The Centrality of Context

Of course all three basic factors come together to provide some context—the scenario in which certain users interact with particular information to perform specific tasks (see 12.3.1.2). In embracing user-centered principles for design, it is essential that the contextual variables are clearly specified. A doctoral student and a solicitor may both be searching an on-line database for references to relevant material, but one may be looking for *any* relevant item while the other may be looking for a specific supporting case. To assume that this is the same task, or that these users are equivalent and could be supported by the same system would be simplistic and lead to the sort of confused reasoning that posits "hypertext is better (or worse!) than paper." Such statements betray a naive acceptance of commonality of purpose and ability on the part of all potential users and is almost certain to lead to lack of usability in systems design.

21.4.5 Usability and Hypertext

Jonassen (1990) recognizes the central connection between hypertext design and user requirements: "The most significant problem in creating hypermedia is deciding how to structure the information. The answer to this question depends, in part, upon how the hypermedia will be used" (p. 12). Wright (1990) also supports a strongly user-centered approach to hypertext design for educational applications. In response to the rhetorical question as to "what really matters?" in hypertext design, she gives an unequivocal answer: "The answer will nearly always depend upon the task that the learner is engaged in. This task will determine the functionality required by the learner . . ." (p. 171).

For some learning tasks, minimal requirements might seem obvious: CD-quality sound for poetry and language students, high-resolution screens for students of the visual arts, and large-format screens for designers. Yet even these would hardly ensure learning and at best could only be considered the starting point for a user-centered design. However, for many learning contexts the functional requirements are not even that specifiable, particularly when interface and information structures are at issue. The only solution is a fine-grained task analysis that cannot only determine the functionality but also the particular instantiation that is most appropriate for the range of users. As Wright points out, there are often many ways in which a function can be provided—just think of the number of ways in which a database can be searched.

The microcomputer has been justifiably celebrated as a real general-purpose tool. Ironically, the hypertext designer may have to constrain the computer in order to empower the user. While the computer can be programmed to undertake highly complex transformations on abstract data structures, the majority of users are more inclined to think in terms of simple transformations on more “concrete” or familiar data structures.

It may seem that we are arguing for a different hypertext instantiation for every learning context based on a new and detailed task analysis. Without a backward look at existing user models of data structures, this would probably be a recipe for chaos. Evidence for this suggestion comes directly from the evolution of our most successful information technology—the printed book.

We have had nearly 500 years experience of using printed textbooks, and they not only support a wide range of applications but users also have such a strong mental model of their generic structure and organization that they can successfully adopt an equally wide range of usage strategies. What we understand as the book’s standard structure, both physical and organizational, evolved over time, and readers’ models also developed and accommodated these changes. However, the enduring success of the book as an artifact is largely due to a faithful adherence to common user expectations—change took place but only very slowly.

While it is clear that hypertext can support activities impossible or very difficult to perform with paper, we must be sure that we introduce such designs in order to improve our support of, or to enable, valid learning tasks. It is not sufficient that we can browse a million pages on our desktop, or link 100 articles together for rapid retrieval at the click of a mouse button: such capabilities are only important in terms of their utility to human learners. Yet there are few signs that most learning scenarios require such support, and little knowledge on how we might best provide it in terms of usability, even if it were required.

21.4.6 Beyond Media Differences—Information Structures and Knowledge Representation

It is clear that readers form mental representations of a paper document’s structure in terms of spatial location (Lovelace

& Southall, 1983) and overall organization. Dillon (1991), for example, has shown that experienced academic journal readers can predict the location within an article of isolated selections of material from it with a high degree of accuracy, even when they cannot read the target material in detail. Such representations or models are derived from years of exposure to the information type or can be formed in the case of spatial recall from a quick scan of the material. Such models or superstructural representations (van Dijk & Kintsch, 1983; see 5.3.7) are useful in terms of predicting where information will be found or even what type of information is available. Consideration of existing models is vital in the design of new versions so as to avoid designing against the intended users’ views of how the information should be organized.

The qualitative differences between the models readers possess for paper and electronic documents can easily be appreciated by considering what you can tell about either at first glance. A paper text is extremely informative. When we open a hypertext document, however, we do not have the same amount of information available to us. We are likely to be faced with a welcoming screen that might give us a rough idea of the contents (i.e., subject matter) and information about the authors/developers of the document, but little else.

Hypertext may appear to be a completely new presentation format and therefore free to establish new user models based on the radically new technology. Unfortunately for the creative system designer, the current generation of potential users approach the new technology with expectations that are grounded in print. This is not surprising when the primary content of most hypermedia systems is, and may well continue to be, text. It may be electronic rather than printed, but that can be a minor difference to the user.

Some researchers have accepted this legacy and constructed hypertext systems that rest heavily on not only the conceptual structure but the physical format as well. Benest’s (1990) hypertext system employs a realistic on-screen representation of an open book with pages that can be “turned.” The system was not designed, or developed, with the benefit of empirical studies, but it is intuitively appealing and an impressive achievement in its time.

In contrast, the SuperBook developed at Bellcore and described comprehensively by Landauer et al. (1993) has benefited from exhaustive user studies (see 30.11.1). SuperBook incorporates a number of familiar print conventions but does not attempt to reinvent the printed book on screen. Instead, development effort has been directed to enhancing the application’s intelligent features in a manner that users can employ effectively. In comparative trials, SuperBook has proved superior to printed texts in terms of speed and accuracy for search-type tasks—but only after repeated tests and redesigns on the basis of those tests (see 12.4.1.2).

What is important to note is that experienced readers have acquired expectations of how information spaces are organized, and we need to be aware of this in our designs. It is precisely because such models of information are often ignored

that we read so much of the navigation problem for users of hypertext (see Dillon, McKnight & Richardson, 1993).

21.5 CONCLUSIONS

If there is little reliable evidence (yet) to support the claims that hypertext systems can really support alternative and superior modes of learning, and we have few effective means of measuring the process of learning anyway, what does that leave us? Three compatible options are available: a reduction in expectations, a switch from process to outcome, and a concentration on an evolutionary approach to development, building on user models rather than trying to make a step-function change: Mao's thousand-mile march started with the first step!

A reduction in expectations is probably now due, given the amount of hype that has accompanied the popularization of hypermedia. As any marketing executive will tell you, a certain amount of hype is necessary in order to stand out against the background noise. However, now that hypermedia has gained a certain amount of acceptance, we can afford to be a little more realistic in our expectations.

A switch from process to outcome might seem reasonable, given our arguments to the effect that psychology does not have a good understanding of the process. Unfortunately, it is no simple matter to measure "learning" as an outcome. Notwithstanding the fact that the education system lumbers on, those involved in the system continue to search for ways that truly reflect meaningful changes in learners as a result of their experiences with the system. It is somewhat ironic that the current emphasis within the British tertiary education system is on measuring the quality of teaching, yet we do not have a philosophically defensible measure of learning against which to judge the teaching function.

Our own preference, as the foregoing has hopefully argued convincingly in favor of, is for an evolutionary approach to system development. However, we take a proactive view of evolution rather than see it as a simple environmental winnowing. We believe that, rather than generating many systems and relying on the "survival of the fittest," it is possible to design "the fittest" for any context by utilizing user-centered, task-based design grounded in an empirical methodology. While we have certain sympathies with the humanistic emphases of the constructivist movement (see 7.4), we find the general scientific approach more fruitful. When the constructivists have achieved as much as the scientists, we may be persuaded otherwise. After all, the essence of science is a mind open to data. For now, the debate continues.

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