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# The Hotkey Palette: Flexible Contextual Retrieval of Chosen Documents and Windows

**Jonathan Aceituno**

Inria Lille – Nord Europe, Université Lille 1  
59650, Villeneuve d'Ascq, France  
jonathan.aceituno@inria.fr

**Nicolas Roussel**

Inria Lille – Nord Europe  
59650, Villeneuve d'Ascq, France  
nicolas.roussel@inria.fr

## ABSTRACT

We present the Hotkey Palette, a quasi-modal interface enabling quick retrieval of chosen documents and windows by defining and triggering keyboard shortcuts either on the physical keyboard or with an on-screen keyboard. The Hotkey Palette improves on previous work by providing flexible contextualization of shortcuts that leverages document hierarchies, and by merging document and window retrieval in a single interface. The paper describes the design and implementation of the interface and presents novel use cases for document and window management.

## Key Words

on-screen keyboard; document retrieval; interface customization; window management

## ACM Classification Keywords

H.5.2 Information interfaces and presentation (e.g. HCI): User interfaces - Graphical user interfaces.

## INTRODUCTION

Users of Personal Computers interact with a large number of resources<sup>1</sup> to do their work. To handle their different tasks, they need their documents to be readily available, and as the number of activities and documents increase, systems must offer adequate support for quick retrieval of these resources.

Document retrieval is primarily done by using a file browser, but navigation in a folder hierarchy takes a long time [3]. The desktop, the Windows Start Menu, OS X's Dock and similar *quick retrieval facilities* help decrease retrieval times by providing customizable areas on which shortcuts to chosen resources or the resources themselves can be placed. They are always available and thereby useful to keep things close at hand. But there is no way to indicate which resource is useful for which task, and the more things there are, the more time it takes to find the documents relevant to the task at hand in these places.

1. In this paper, the resources or documents we consider are local files, folders and applications, but also remote web pages, and, more generally, anything that can be identified with a uniform resource locator (URL) [4].

Quick access to specific resources can also be provided by keyboard shortcuts. But the facilities provided to define these shortcuts are usually hard to use, and remembering them all is difficult. Graphical representations reifying the shortcuts and supporting direct manipulation can help. Touch-display keyboards (TDK [5]) would make it possible to create a keyboard shortcut by dragging a document to the desired key, for example. But such keyboards are currently uncommon and such a simple approach does not scale: one not only needs shortcuts but also ways to organize them. Existing on-screen keyboards, such as *Qliner hotkeys*<sup>2</sup>, share the same scaling issues and do not convey the state of the resource.

The way people configure quick retrieval facilities depends on the context in which resources will be used [17]. Some resources pertain to specific projects while others are more general, and the users' workarounds to put resources close to where they might need them, as described in [17], suggest a lack of support for resource contextualization in current retrieval facilities. When all the needed documents for a task are found and open, the problem furthermore shifts from document retrieval to window management. Unlike document retrieval facilities, many window managers support the notion of task context by proposing window grouping [12] or virtual desktops [7]. However, window managers usually do not take the user's previous efforts on resource organization into consideration and require additional management that could be avoided.

Recent systems [2, 16, 8] help solve the contextualization problem by explicitly representing the activities used to organize resources and work around them. Activity-centric environments help effectively manage access to related windows *and* documents using the same notion of activity. For example, Giornata [16] not only maps windows of different activities to different virtual desktops, but also associates the files on each desktop to the relevant activity, which is particularly appreciated by users. Yet activities have blurry boundaries and users have trouble defining and separating them [1]. Moreover, activity-based approaches do not support finer-grained (linking a document to another) or coarser-grained (associating a document to several activities) contextualizations.

In this paper, we present the Hotkey Palette (Figure 1), a quick retrieval facility that uses hotkeys and makes them visible and configurable through a quasi-modal [10] always-available on-screen keyboard. This facility contributes to the state of the art in three ways:

2. <http://www.qliner.com/hotkeys>



Figure 1. Hotkey Palette displayed on the bottom of the display, on top of other windows.

- it extends on-screen keyboard interaction by providing feedback on the state of the linked resources;
- it provides persistent and integrated access to local windows and files and other online resources;
- it provides flexible control over contextualization by leveraging existing resource hierarchies.

The rest of this paper is organized as follows. We first describe the design, the interaction techniques and the implementation of the Hotkey Palette. We then describe different usage patterns and finally conclude with a description of future work.

### THE HOTKEY PALETTE

The Hotkey Palette (Figure 1) uses an on-screen keyboard to visualize and configure persistent shortcuts to access chosen documents and windows. It appears without delay when the user holds a particular modifier key, so as to provide immediate visual information to help key selection without hindering expert performance. In our implementation, we chose the *Fn* key of Apple keyboards, to avoid interfering with system shortcuts. The Hotkey Palette allows to access documents and windows by pressing associated keys while holding the modifier, and disappears when it is released. In this section, we explain how contextualization works, describe design of the Hotkey Palette and the interaction techniques it affords before detailing its current implementation.

### Supporting contextualization

The following example describes our approach to the problem of resource contextualization that was described in the introduction, using the notions of *contextual shortcuts* and *hierarchical specialization* that we will detail later on.

Imagine a user, Alice, filing her projects on a local hard disk using the following hierarchy: the *Documents* folder contains two folders, *Work* and *Personal*, that each contain folders for her work and personal projects respectively. She already has a *global* hotkey providing a shortcut to her *Documents* folder from anywhere using *Fn+D*. But she has two different to-do lists, for work and personal projects, and wants to have them handy. She creates two *contextual* shortcuts mapped on *Fn+T*: one in her work folder mapping it to her work to-do list, and

the other in her personal folder mapping it to the personal one. Thanks to *hierarchical specialization*, pressing *Fn+T* while working on a work project (i.e. any document in *Work* or its sub-folders) will thus open the work to-do list, but pressing the same *Fn+T* while working on a personal project (i.e. any document in *Personal* or its sub-folders) will open the personal to-do list.

One of Alice's personal projects is to maintain the web site of the local poker league, and she frequently receives e-mails from members prompting her to announce tournaments on this site. To support her workflow, she has created a contextual shortcut to the local copy of the web site's announcements page associated to her mail application, and another to a synchronization script associated to the entire web site's local copy (i.e. the enclosing folder). When she receives an announcement mail, she uses the former shortcut to quickly access the announcements page and modify it. From this document, through *hierarchical specialization*, she can use the latter to synchronize the online web site with the modified local copy.

We can see in this example that contextual shortcuts differ from global ones in that they are associated to a specific resource (interaction details are discussed later). They are only available when that resource is the current object of interest (the one displayed in the active window), thus providing context-specific access to others. *Hierarchical specialization* makes it possible to support the same contextual shortcuts on different related resources by exploiting their hierarchical relation.

In the above example, several shortcuts are mapped to the same key. To determine which shortcut is the most relevant to the current resource of interest, we use the following relevance order:

- contextual shortcuts pertaining to this object (*X*),
- contextual shortcuts pertaining to any resource *Y* such that *Y* is an ancestor of *X*<sup>3</sup> (the closer, the better),
- global shortcuts.

3. Every document has a URL which path can be used to determine the relative location to another, if they live in the same hierarchy. The folder `file:///Documents` is an ancestor of the file `file:///Documents/Work/IHM14 Paper.doc` for example.

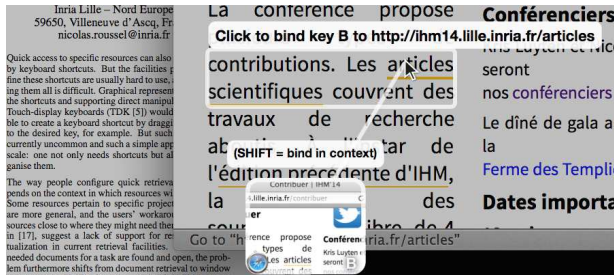


Figure 2. Holding  $Fn+B$  and pointing to a hyperlink to configure a shortcut to it on key B.

*Hierarchical specialization* is the outcome of the above rule: when a contextual shortcut is associated to a folder, it will be available by default for all its descendants.

### Interaction

In the example above, the user created and triggered shortcuts. Here, we detail the interaction techniques that support these functionalities and more advanced ones.

#### Configuring a hotkey

Pressing  $Fn$  and some unused key  $X$  creates a global shortcut mapping  $Fn+X$  to the current resource of interest. Holding  $Fn+X$  while clicking on an on-screen resource creates a global shortcut to it (Figure 2, left). Holding  $Fn+Shift+X$  when clicking instead results in a contextual shortcut to it associated to the current resource of interest (Figure 2, right). When the user is holding  $Fn+X$  or  $Fn+Shift+X$ , the palette disappears to prevent occluding potential targets, and the current resource of interest and the resource under the mouse pointer are highlighted.

#### Triggering a hotkey

To trigger an existing shortcut mapped on a particular key, e.g.  $X$ , the user must hold the  $Fn$  modifier and press  $X$ . This brings the associated resource to the foreground. As an alternative, the user can click on the desired key when the Hotkey Palette is shown. Like command hotkeys whose meaning can change according to the active application, the resource associated with a key may depend on the current resource of interest. Since shortcuts are persistent, the triggered one may be associated to a resource that is not available on-screen anymore. In this case, the resource is re-opened, if possible. If not, a system beep is issued.

#### Visual design

The Hotkey Palette appears on the bottom of the user's main display as a semi-transparent on-screen keyboard sized to fill the whole horizontal space (Figure 1). Only the keys on the three letter rows of the keyboard<sup>4</sup> are used. This way, each object associated to a key is displayed in a square taking up about  $1/11$  of the horizontal resolution of the main display (174 pixels on a 1920x1080 display, 93 pixels on a 1024x768 display).

What is displayed on each key of the palette depends on the resource associated to it. If there is no shortcut, the key is just displayed with its character as an empty square

4. In a standard QWERTY keyboard, these rows correspond to characters Q to P, A to ;, and Z to /.

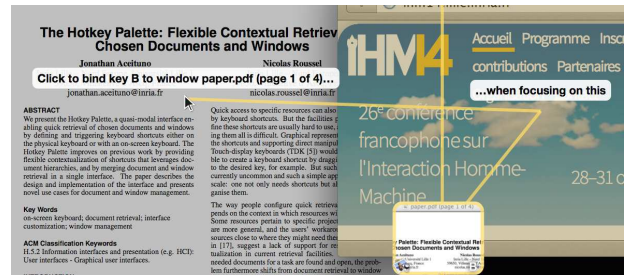


Figure 3. Holding  $Fn+Shift+P$  and pointing to a document to configure a contextual shortcut to it associated to the front window on key P.

with a white border (Figure 4a). If the key is associated to a local or remote document (e.g. a web page), an up-to-date preview is displayed together with its title, filling the whole square (Figure 4b). If a preview is not available, its title and/or URL is displayed instead (Figure 4c). If the key is associated to a window, its aspect ratio is modified to fit the window's, and an up-to-date and unscaled preview of the window centered on its title is displayed together with the application icon (Figure 4d). We chose this presentation because we found it easier to distinguish between similar windows than with scaled-down screenshots.

If a window that does not exist anymore can be re-opened, its preview is yellowed like an old photograph to indicate that it is not up-to-date (Figure 4e). If the window or resource cannot be found anymore, for example because it has been deleted, its preview is grayed to indicate that accessing the resource is no longer possible (Figure 4f).

The border of a key indicates the level of contextuality of its shortcut. A white border is used if the shortcut is global. A yellow border (Figure 4g) indicates that the shortcut is associated to the currently active resource. Finally, a red border (Figure 4h) indicates that it is associated to one of its hierarchical ancestors.

#### Graphical interaction

When the Hotkey Palette is visible, advanced graphical interaction with the shortcuts is possible. They can be moved around the keyboard using drag-and-drop. Users can drag a document from any application, hold  $Fn$  and drop it on a key to create a global shortcut (as before, holding  $Fn+Shift$  results in a contextual shortcut related to the current resource of interest). Dropping a document on a key containing an application or a script will launch the script or application using the dropped document as a parameter. Dragging a shortcut to a document from a key and dropping it in an external window will have the same effect as dropping the document itself. The palette occupies a large part of the screen, but it can be hidden at any time by releasing the modifier key, even in the course of a drag-and-drop action. A right click on a key shows a menu with options to delete the shortcut and, for contextual ones, to bring up the resource defining the context.

#### Implementation

Our prototype is implemented in Objective-C with Cocoa and runs under OS X. We used the Quartz Window Services API to retrieve window information, and the Acces-





**Figure 4.** Closeup on the top left keys of the Hotkey Palette above the active window: (a) empty key; (b) document preview; (c) document title when the preview is not available; (d) window preview; (e) yellowed preview of a closed window; (f) grayed preview of a deleted document; (g) contextual shortcut associated to the active window (yellow border); (h) contextual shortcut associated to an ancestor of the document shown in the active window.

sibility API to inspect objects under the mouse, as well as to get specific information on the contents of a window, such as the document it represents. We also used the bookmarks API to make shortcuts resilient to renamed or moved documents, ensuring that they can always be opened, and the previews of local documents and remote web pages are generated using the Quick Look API and WebKit, respectively.

To ensure persistence over time, for example to be able to re-open a window that has long been closed, the program saves specific cues about the corresponding resource and its context whenever a shortcut is created. These cues are different according to the type of the resource: a simple URL for remote resources, and a relocation-resilient bookmark for local resources. For windows, cues include the application identifier, the window identifier in the accessibility API, its title, and a relocation-resilient bookmark for the document it represents, if any. When the program loses track of a window, it tries to match the saved cues to each of the opened ones to find it again. If it cannot be found, the program tries to locate the resource that was displayed in the window and to re-open it.

## USAGE PATTERNS

In this section, we present some of the usage patterns that the distinctive features of the Hotkey Palette enable, namely: reminding the user of something to do, monitoring changes, improving web page revisitation, and cycling between specific documents or windows.

### Reminders and monitors

Shortcuts to resources can be used as reminders of related actions to execute in the future. These reminders can be contextual shortcuts, so that the user chooses *when* to be reminded of them. For example, Alice may create a contextual shortcut associating a photograph of her coworker Bob to her *Work* folder so that the next time she works on a project in this folder and brings up the Hotkey Palette, she will incidentally be reminded of inviting him to the next poker tournament.

Because it shows large and up-to-date previews, the Hotkey Palette can also be used to monitor changes on

documents and web pages. Although the current implementation does not indicate whether the document has changed since the last visit, users can still benefit from the up-to-date preview to check, for example, if Alice has indeed updated the poker league's website as expected.

### Alternative bookmarks

Web page revisitation is primarily supported in web browsers by bookmarks and history. The Hotkey Palette can also act as an alternative bookmark facility, or an extended version of PageLinker [15]: here, one can not only associate a web page to another, but contextual links can also be created between web pages and any local resource, in both directions. Like with PageLinker, the query part of the URL is not taken into account for context to avoid tying shortcuts to a particular web session. Hierarchical specialization works in this case because web URLs have paths.

### Local cycling

In his description of the *memex* [6], Vannevar Bush defined associative trails as a chain of documents linked together, sometimes branching off to side trails. The imagined interactions with these trails involved only hitting a few keys. While the Hotkey Palette is not designed to handle trail navigation, this principle can still be useful to quickly travel along a trail of related resources by creating contextual shortcuts mapped to the same key and associating these resources.

Alice could use this approach to create a personal web-bring linking her preferred poker news sites, for example. But she could also use it to cycle between a specific list of applications. She could use the *C* key to cycle between all her communication applications, for example. To do so, she would first create a global shortcut mapping that key to the contact list of her instant messaging application. She would then define a contextual shortcut from this window to her mail application, using the same key. She would continue with the websites or applications of her various social networks. Pressing *Fn+C* on any of these resources would then bring up the next one, the global shortcut to the instant messaging application closing the ring.

## DISCUSSION

Extensive use of the Hotkey Palette during its development allowed us to refine the design and witness the emergent usage patterns enabled by contextual shortcuts and hierarchical specialization that are described in the previous sections. A longitudinal study would bring deeper understanding of the benefits and drawbacks of these ideas in document and window management.

The focus of this paper was more on introducing and demonstrating these concepts, by way of the Palette, than in validating interface design choices. The latter is required before deployment to real users but might not be trivial. For example, choosing *Fn* as the modifier is convenient for our demonstration, but is not adapted for real-world use because it is located on the bottom left of the MacBook keyboard, thus making key combinations like *Fn+P* difficult to reach with one hand.

Nevertheless, contextual shortcuts and hierarchical specialization being intended to enable *quick retrieval*, we strived for a minimal amount of effort in order not to discourage the use of the Hotkey Palette. Further study will ultimately confirm whether our design was successful in this regard. It would also help determine how to best incorporate the Hotkey Palette into existing tasks and encourage its use where beneficial.

## CONCLUSION

In this paper, we presented the Hotkey Palette, a quick retrieval facility based on user-defined shortcuts with the following distinctive features: quasi-modal interaction with an on-screen keyboard, persistent and integrated access to local windows and files and other online resources, and flexible contextualization based on resource hierarchies. We detailed the peculiarities of our design, the associated interaction techniques and our current implementation. Finally, we showed how the technique allows novel uses in window and document management.

By merging two input modalities, pointing and typing, on a shared representation, on-screen keyboards may provide benefits for intermodal learning [14], as syntactically similar actions (e.g. pressing a key vs. clicking an on-screen key) have the same effects. In addition, they provide a spatially stable layout, allowing users to rely on their special memory, which could lead to faster retrieval times [11, 13]. Both of these hypotheses require further investigation. In the future, we would also like to investigate how the design of the Hotkey Palette could be used to improve learning of application hotkeys, and how it compares to recent work [9].

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