

# **Intelligent Assistants – Conceptual Dimensions, Contextual Model, and Design Trends**

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**Appendix (available online via <http://link.springer.com>)**

## A Complete List of Articles used for Literature Review

### List of Articles used for Research Objective 1

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### List of Articles used for Research Objectives 2 & 3

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## B Article Selection Methodology

The article selection methodology is shown in **Table 4**. For research objective 1, we conducted a general search for terms that are used to designate the professional roles of assistants or terms. We used the advanced search feature of Google Scholar to look for ‘the exact phrase, anywhere in the article’. Since results are sorted by relevance, for each search we went through the first 10 pages and chose respective articles after reading the abstract.

To consider various terms used in describing intelligent assistants, we conducted an explorative search. We found that articles presenting intelligent assistants use a combination of an adjective as an alias for some sort of intelligent ability (smart, personal, adaptive, cooperative, or intelligent), followed by a verb in some cases which represents an activity (for example driving, writing, teaching, learning etc.), and the word ‘assistant’ or ‘assistance’. These terms were then used to construct a search expression that searches for the adjectives within 5 words of assistan\* (which includes assistance, assistants, assistant). We used a full metadata search (including title, abstract and keywords) and excluded commercially available assistants to focus on the research side of the domain.

We filtered the resulting dataset in two rounds, first by reading the title and then the abstract. The articles selected in the final round were distributed among the co-authors and read in depth.

Table 4: Article Selection Methodology

Search Terms	Databanks/Search Engine(s)	Inclusion Criteria	Exclusion Criteria	Initial Hits	Filtered first round	Filtered second round
<b>A clarification of the notion of assistance (RO1)</b>						
‘administrative assistants’, ‘medical assistants’, ‘nursing assistants’, ‘healthcare assistants’, ‘surgical assistants’, ‘teaching assistants’, ‘work of assistants’, ‘role of assistants’ (and variations thereof).	Google Scholar	Articles carried out a systematic qualitative or ethnographic study of human assistants at work	Articles that evaluated workplace trends in the respective fields of assistance	18	11	7
<b>A typology for intelligent assistance (RO2)</b>						
(“adjective” + “verb” + “assistan*”) or (“adjective” + “noun” + “assistan*”), where the adjective is one of the following: smart, intelligent, adaptive, personal, cooperative. Wherever supported, a word distance based search was performed (for example “intelligent” ONEAR/5 “assistan*”).	IEEE Explore, ACM Library, Science Direct, SpringerLink and ISI Web of Knowledge	Article was published in the last 25 years (1994-2019), presented a framework or a system that offers some form of assistance, discussed the features of the system	Article did not present a system but used the keywords in a different context, proposed only the design of a system without a description of its functionality, was not available in a full-text form, already existed in the search results or was a review article	2317	356	111
<b>Design and evaluation criteria for intelligent assistance (RO3)</b>						
n.a.	data set filtered after first round in RO1 was used	articles that mention design goals, guidelines or design principles/heuristics etc.	articles that only present a system, do not specify any design goals, guidelines or principles		356	24
n.a.	data set filtered after first round in RO1 was used	articles that evaluate the assistance system presented	articles that do not carry out an evaluation of the presented system		356	60

## C Typology Creation

The first stage of the typology creation contains characteristics that were identified from RO1 (Conceptual-to-empirical). Since it concerns the human aspect of assistants, we expected that entries would have to be removed or modified. The ‘client’ was removed from the cooperating entities list, since intelligent assistants have been developed for one-to one interaction with the user. The activities performed by human assistants are varied, and were not carried over to the next iteration; the activities of intelligent assistants are primarily digital and interactive. Finally, we did not find any support for contingency response in the design of intelligent assistants, so the dimension was also removed. In the second iteration, we added characteristics of intelligence and intelligent agents, and went through the articles in a chronological manner to refine the typology. The final typology is shown in **Table 1**.

Table 5: Typology Creation Iteration 1 and 2

Meta-Characteristic	Conceptual-to-empirical (Iteration 1)		Empirical-to-conceptual (Iteration 2)	
	Dimension	Characteristic	Dimension	Characteristic
Outcome	outcomes	maintain service provision	outcomes	reduce workload
				learning/skill acquisition
Environment	outcome type	augment	outcome type	augment
		compensate		compensate
	cooperating entities	principal	assistance target	user
		assistant		application
		client		tools
		tools		objects
	domain	teaching	domain	software development
		medical		design/verification
		administrative		legal
Assistant	activity	foreground tasks	activity	decision support
		background tasks		answer queries
		problem solving		execute tasks
		maintain situation awareness		
	initiative	self-initiated	invocation mode	autonomous
		delegation		delegated
		mixed		mixed
	contingency-response	intervene	flexibility	adaptive
		adapt		adaptable
				static
			input combination(s)	peripheral
				speech
				language
			output combination(s)	visual
				speech
				haptic
			modality	unimodal
				multimodal
			character	yes
				no
	ubiquity	platform-specific		
		web-based		
	learning capability	learning		
		learned		

Table 6: Typology Creation Iteration 3 and 4

Meta-Characteristic	Empirical-to-conceptual (Iteration 3)		Empirical-to-conceptual (Iteration 4)	
	Dimension	Characteristic	Characteristic	
Outcome	outcomes	improve productivity	improve productivity	
		learning/skill acquisition	learning/skill acquisition	
		augment experience	augment experience	
		improve work quality	improve work quality	
	outcome type	augment	augment	
		compensate	compensate	
Environment	assistance target	user	application-interface	
		application-interface	objects	
		tools	application-interface & object	
		objects		
	domain	software development	professional	
		design/verification		
		medical work		
		legal		
		administrative	private	
		education	education	
		e-commerce		
	Assistant	activity	providing information	providing information
			executing tasks	executing tasks
		invocation mode	autonomous	autonomous
delegated			delegated	
mixed			mixed	
flexibility		adaptive	adaptive	
		adaptable	adaptable	
		static	static	
input combination(s)		peripheral	peripheral	
		speech/language	language and peripheral	
		language and peripheral	language only	
		sensor input	sensor input	
			peripheral and sensor input	
			language & peripheral & sensor input	
output combination(s)		visual	visual	
		speech/language	language and visual feedback	
		haptic	language only	
			visual and haptic	
			haptic	
modality		unimodal	unimodal	
		multimodal	multimodal	
embodiment		yes	yes	
		no	no	
ubiquity		platform-specific	platform-specific	
		mobile	mobile	
		web-based	web-based	
		multiple devices	multiple devices	
learning capability		learning	learning	
	learned	learned		

## D Qualitative Review of Design Influences, Evaluated Attributes and Evaluation Methods

The summary of design goals in **Table 2** is based off **Table 7**. Similarly, the summary of evaluated attributes in **Table 3** is based off **Table 8**. We gathered the attributes after reading the articles listed in the table(s).

Table 7: Design influences in intelligent assistant research.

Paper Title	Year	Design influence
Intelligent media agents in interactive television systems	1995	personalization
SIMPSON: An intelligent assistant for short-term manufacturing scheduling	1996	task congruency, information congruency, maintainability
MASMA: A personal assistant for meetings management	1997	control of initiative, personalization
YPA – an intelligent directory enquiry assistant	1998	usefulness, user-friendliness
MailCat: An Intelligent Assistant for Organizing e-Mail	1999	simplicity, unobtrusiveness
INSYDER – an Information Assistant for Business Intelligence	2000	agent attributes
Context-aware Office Assistant	2000	context aware computing
USCSH: An active intelligent assistance system	2000	effectiveness, task accomplishment
The Intelligent Classroom: Providing Competent Assistance	2001	competent assistant (bound to specific tasks)
Mixed-initiative, multi-source information assistants	2001	mixed initiative agents
A Writer’s Collaborative Assistant	2002	Shared Plans theory of collaboration
IntelliShopper: a proactive, personal, private shopping assistant	2002	autonomy, personalization, privacy
DORIS – Pedagogical Agent in Intelligent Tutoring Systems	2002	environment perception, autonomy, sociability, adaptability, mobility
Balancing Efficiency and Interpretability in an Interactive Statistical Assistant	2003	efficiency, interpretability, granularity, context, explicitness
An intelligent personal assistant for task and time management	2007	directable, personalizable, teachable, transparent
FleXConf: A Flexible Conference Assistant Using Context-Aware Notification Services	2009	context awareness
Agent-assisted Task Management That Reduces Email Overload	2010	usability, performance, predictability, understandability
Ma\$\$iv? An Intelligent Mobile Grocery Assistant	2012	user centred design
Learning Intelligent System for Student Assistance – LISSA	2016	BDI Agents
Artemisa: A Personal Driving Assistant for Fuel Saving	2016	gamification
PrIA: A Private Intelligent Assistant	2017	personalize privately instead of aggregating collective data
A Personal Medical Digital Assistant Agent for Supporting Human Operators in Emergency Scenarios	2017	context awareness, provide assistance without distraction or interruptions
Designing Out Stereotypes in Artificial Intelligence: Involving Users in the Personality Design of a Digital Assistant	2018	user centred design, participatory design
Protecting privacy and open competition with Almond: An open-source virtual assistant	2019	openness, privacy, control

Table 8: Evaluation of intelligent assistants

Title	Year	Evaluated Attribute	Group	Type
User interface design assistance for large-scale software development	1994	usability	usability	qualitative
The Daimler-Benz steering assistant: a spin-off from autonomous driving	1994	driving attributes	user performance	quantitative
An intelligent symbol usage assistant for CAD systems	1994	predictive accuracy	system performance	quantitative
Intelligent assistance for intravascular telesurgery and experiments on virtual simulator	1995	collision times	user performance	quantitative
Agents in Their Midst: Evaluating User Adaptation to Agent-assisted Interfaces	1998	usage metrics (sorting time, placement rate), error metrics (user error, agent error, increase in error rate), observations and interviews	user and system performance, user feedback	mixed methods
An Experiment with Navigation and Intelligent Assistance	1998	precision (proportion of retrieved information that is relevant), recall (proportion of relevant information that is retrieved), user actions (selections and duration)	user and system performance	quantitative
C-MAP: Building a Context-Aware Mobile Assistant for Exhibition Tours	1998	usability and user feedback	usability, user feedback	mixed methods
Intelligold-an expert system for gold plant process design	1999	case study	system performance	qualitative
MailCat: An Intelligent Assistant for Organizing e-Mail	1999	predictive accuracy	system performance	quantitative
PTA – A Personal Translation Assistant for Accessing the World Wide Web	1999	user feedback about assistants behavior	user feedback	qualitative
INSYDER – an Information Assistant for Business Intelligence	2000	effectiveness (task completion), efficiency (task completion time), satisfaction (subjective acceptance)	user performance, user feedback	quantitative
Communication Management: E-Mail and Telephone Assistants	2000	technical functionality	system performance	quantitative
Balancing Efficiency and Interpretability in an Interactive Statistical Assistant	2002	Usability (ease of learnability, usefulness)	usability	mixed methods
IntelliShopper: a proactive, personal, private shopping assistant	2002	learning accuracy	system performance	quantitative
An intelligent teaching assistant system for logic	2002	student progress	user performance	quantitative
Balancing Efficiency and Interpretability in an Interactive Statistical Assistant	2003	user operations (navigation, analysis, organization)	user performance	quantitative
Intelligent Assistance, Retrieval, Reminder and Advice for Fuzzy Multicriteria Decision-Making	2003	prediction	system performance	quantitative
An Intelligent Assistant for Training of Power Plant Operators	2006	operator performance	user performance	quantitative
ECPIA: An email-centric personal intelligent assistant	2006	technical performance	system performance	na
MIKI: A Speech Enabled Intelligent Kiosk	2006	user reactions	user feedback	qualitative
Survey Measures for Evaluation of Cognitive Assistants	2007	ease of use, usefulness, collaboration, disorientation, flow	ease of use	quantitative
MARA – A Mobile Augmented Reality-Based Virtual Assistant	2007	user feedback about assistants behavior	user feedback	qualitative
Learning Assistant – Personalizing Learning Paths in e-Learning Environments	2008	learning performance	user performance	quantitative
RelAltTab: Assisting Users in Switching Windows	2008	user effort	user performance	quantitative
Intelligent User Assistance for Cost Effective Usage of Mobile Phone	2008	predictive accuracy	system performance	quantitative
Intelligent assistance in authoring dynamically generated web interfaces	2008	user effort, UI Satisfaction, Perceived Usefulness and Ease of Use	user performance, user feedback	quantitative
Virtual assistant: an artificial agent for enhancing content acquisition: how ambient media elicit information from humans	2008	subjective evaluation	user feedback	quantitative
IPA – An intelligent personal assistant agent for task performance support	2009	learning accuracy	system performance	quantitative

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Table 8: Evaluation of intelligent assistants

Title	Year	Evaluated Attribute	Group	Type
Intelligent assistance for teachers in collaborative e-learning environments	2009	system performance	system performance	quantitative
Agent-assisted Task Management That Reduces Email Overload	2010	user performance	user performance	quantitative
LABTA: An Agent-Based Intelligent Teaching Assistant for Experiment Courses	2010	user satisfaction (ease of use, appearance, abilities)	user feedback	quantitative
Intelligent Content-Based Privacy Assistant for Facebook	2011	predictive accuracy	system performance	quantitative
ASISTO: An integrated intelligent assistant system for power plant operation and training	2011	user progress	user performance	quantitative
PTIME: Personalized Assistance for Calendar-ing	2011	usefulness, usability, performance	system performance, user feedback	mixed methods
The Director’s Lens: An Intelligent Assistant for Virtual Cinematography	2011	user effort	user performance	qualitative
SWIMS (Speech-Based Web Interface for Mathematics Using Statistical Language Models): An Intelligent Editing Assistant for Mathematical Text	2012	predictive accuracy	system performance	quantitative
Gardener: A file browser assistant to help users maintaining semantic folder hierarchy	2012	LKM-GOMS	user performance	quantitative
Towards an Intelligent Reviewer’s Assistant: Recommending Topics to Help Users to Write Better Product Reviews	2012	learning accuracy, usefulness	system performance, user feedback	mixed methods
The Voice User Help, a Smart Vehicle Assistant for the Elderly	2012	technology acceptance	technology acceptance	quantitative
Design and Evaluation of a Haptic Computer-Assistant for Telemanipulation Tasks	2013	operator performance	user performance	quantitative
Performance evaluation of an intelligent multimedia learning assistant platform	2014	student progress	user performance	quantitative
Artificial Intelligence Gaming Assistant for Google Glass	2014	technical performance	system performance	quantitative
A computer vision-based assistant system for the assembly of narrow cabin products	2015	technical performance	system performance	quantitative
CogniWin-A Virtual Assistance System for Older Adults at Work	2015	helpfulness, improved work efficiency, usefulness, wellness	user performance, user feedback	quantitative
An intelligent assistant for physicians	2016	classification accuracy	system performance	quantitative
An intelligent system to assist the diagnosis of epilepsy disorder in children: A case of study	2016	classification accuracy	system performance	quantitative
Understanding User Satisfaction with Intelligent Assistants	2016	user satisfaction, user effort, task completeness, speech recognition quality	user and system performance	quantitative
Artemisa: A Personal Driving Assistant for Fuel Saving	2016	driving parameters	user performance	quantitative
Intelligent driving assistant based on accident risk maps analysis and intelligent driving diagnosis	2017	Assistant accuracy, driving performance	user and system performance	quantitative
“What Can I Help You with?”: Infrequent Users’ Experiences of Intelligent Personal Assistants	2017	focus group	user feedback	qualitative
PrIA: A Private Intelligent Assistant	2017	precision comparison with state-of-the art based on user feedback	system performance, user feedback	quantitative
brAInstorm: Intelligent Assistance in Group Idea Generation	2017	Perceived effectiveness, user satisfaction	user feedback	na
A Personal Medical Digital Assistant Agent for Supporting Human Operators in Emergency Scenarios	2017	usability, responsiveness	usability	qualitative
Darwin: Convolutional Neural Network based Intelligent Health Assistant	2018	classification accuracy	system performance	quantitative
Dinus Intelligent Assistance (DINA) Chatbot for University Admission Services	2018	classification accuracy	system performance	quantitative
Iris: A Conversational Agent for Complex Tasks	2018	user effort	user performance	quantitative
PRoA: An intelligent multi-criteria Personalized Route Assistant	2018	comparison with state of the art	system performance	quantitative
Context-Aware Conversational Developer Assistants	2018	subjective evaluation	user feedback	qualitative

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<b>Title</b>	<b>Year</b>	<b>Evaluated Attribute</b>	<b>Group</b>	<b>Type</b>
Usage-Based Learning in Human Interaction with an Adaptive Virtual Assistant	2019	user effort	user performance	quantitative
From Eliza to Xiaolce: challenges and opportunities with social chatbots	2018	conversations per turn	user and system performance	quantitative