Label placement in forms
(and other time-consuming controversies)
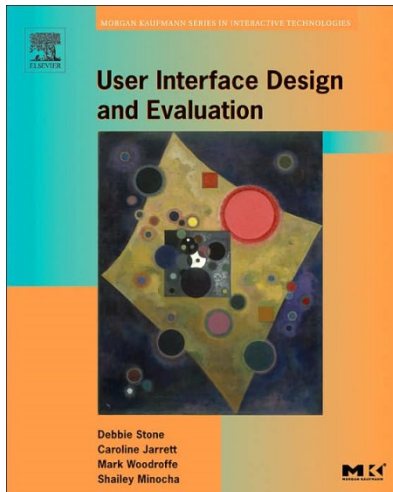
Caroline Jarrett
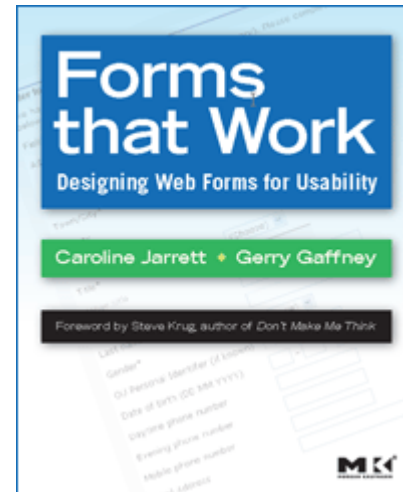
Seattle April 2010

A bit about me:
Caroline Jarrett

Consultancy: www.effortmark.co.uk

Training: www.usabilitythatworks.com

Forms advice: www.formsthatwork.com

Editing tips: www.editingthatworks.com

Stone, Jarrett, Woodroffe and Minocha (2005)

User interface design and evaluation

Morgan Kaufmann

Jarrett and Gaffney (2008)

Forms that work: Designing web forms for usability

Morgan Kaufmann

Agenda

Label placement on forms

- Where people look on forms
- How this influences placing of labels

Let's stress about details

- Colons in front of labels
- Sentence or title case for labels
- Required field indicators

Two ways to trip up your users

- It's not OK and I don't want to cancel
- 'False ends'

If it looks good, it's easy to use:

- Keep the logo in proportion
- Calm your creative impulses
- Design to a grid
- Use rules with a light touch

Where people look on forms

Reading forms is different from using them

The 'face and vase' effect – and why your logo goes in the top left

The 'narrow focus' effect – and what it means for placing labels

Reading forms is different from using them

Reading forms is different from using them

* Surname: _____

* First name: _____

Middle name: _____

Title: _____
(For example. Mr, Mrs)

* Address line 1: _____

Address line 2: _____

Address line 3: _____

Address line 4: _____

Postcode: _____

* National Insurance number: ❓ _____
(For example: AB123456C)

☐ Select box if National Insurance number not yet known

Are my observations confirmed by eye-tracking? A look at some heat maps

Examples thanks to permission from

Ian Roddis, Head of Online Services, The Open University
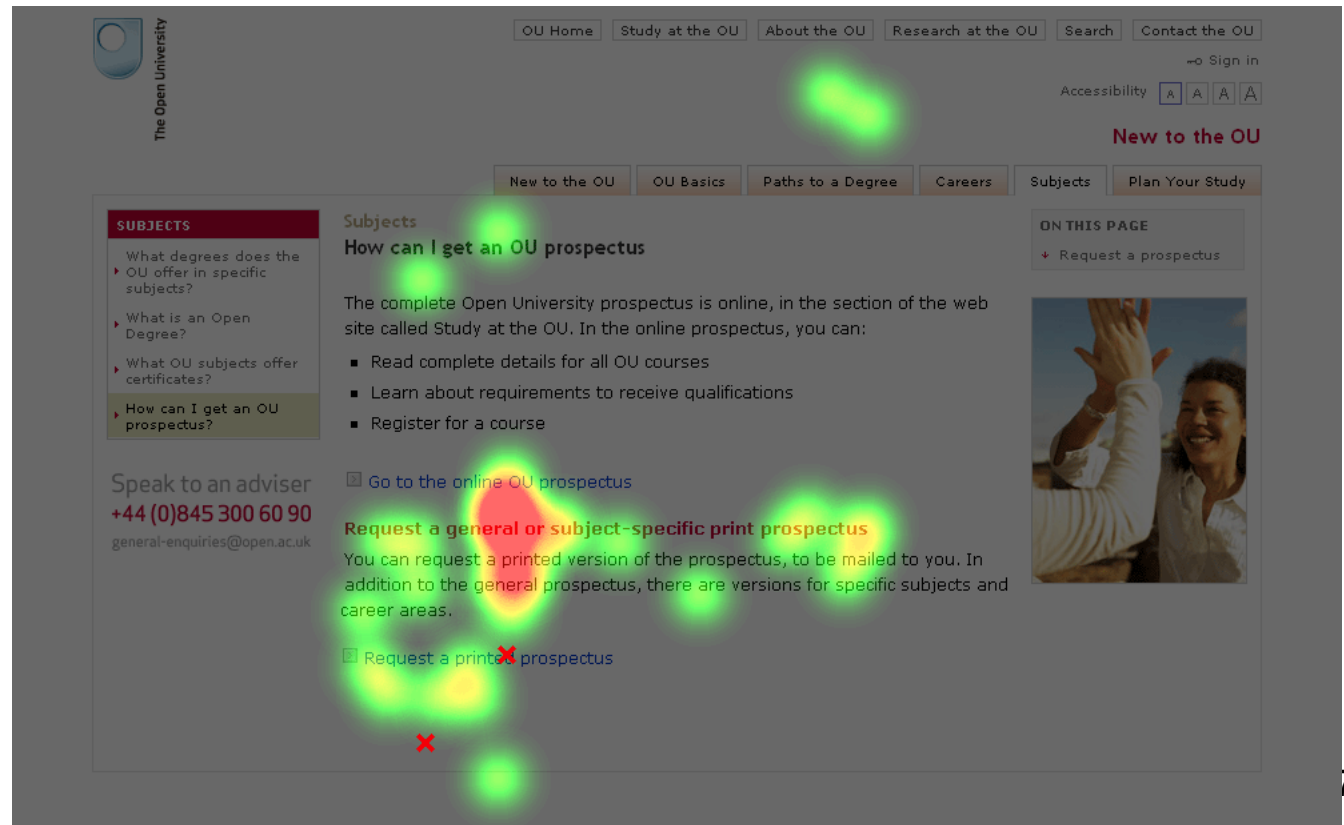
Ordering a prospectus

- User has chosen a prospectus

- Postcode lookup for the address

The Open University

Prospectus Request

If you need HELP please email General-Enquiries@open.ac.uk or call us on +44 (0)845 300 6090

Order for myself

We have filled in your address (amend where necessary). Please complete the details below

Fields marked * must be filled in

Address*

Town/City*   LEIGHTON BUZZARD

County   Beds

Postcode

Title*   (Choose)

Other title

First name*

Last name*

Gender*   (Choose)

OU Personal Identifier (if known)

Date of birth (DD MM YYYY)   –   –

Daytime phone number

Evening phone number

Mobile phone number

Email Address

Which of these subject areas are you most interested in studying with the Open University?   (Choose)

Which of these best describes your reason for enquiring about study with the Open University?   (Choose)

When would you like to start studying with the Open University?   (Choose)

How did you find out about us?
Please tell us how you found out about our website

If the promotion you saw has a response code please enter it here (e.g. UGCXYZ)...

If you do not have the response code in which publication/website did you see our promotion?   (Choose)

proceed

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One person's heat map

- Small green dots show narrow focus on labels and left end of fields
- Red crosses show clicks

An aggregate

- Narrow focus on the easy questions at the top

- Gets messy further down: harder questions, more answers to consider

The 'face and vase' effect – task can drive where you look

- If you want to, you can decide to look at the faces (black) or the vase (white)

- Change of task, change of vision: the same thing works on the web
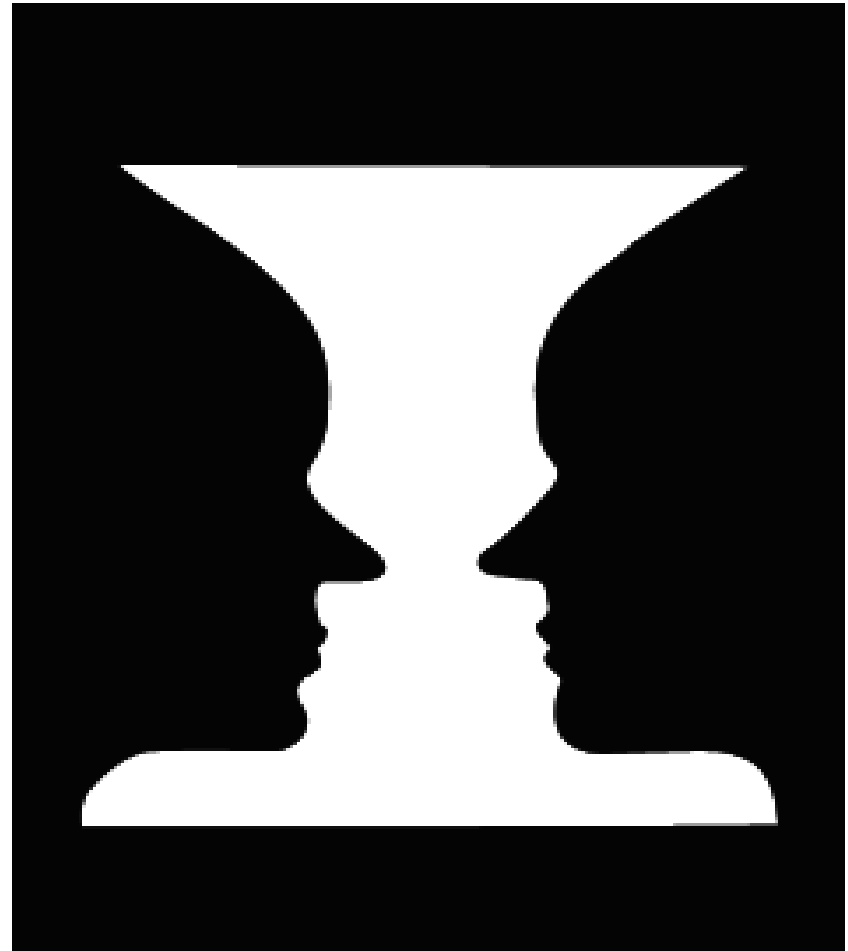
Now try it for yourself

- Pick ONE of these two tasks:
    - "Look for something to help you plan your assignment"
    - "Find out how to contact the Open University"
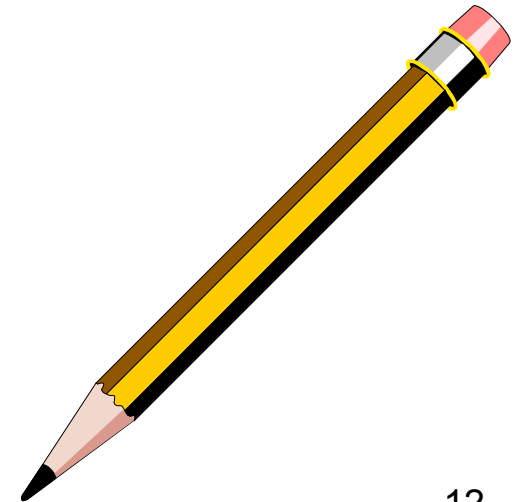
Face and vase / figure and ground on the web

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User never glances at the header until the task requires header-type information
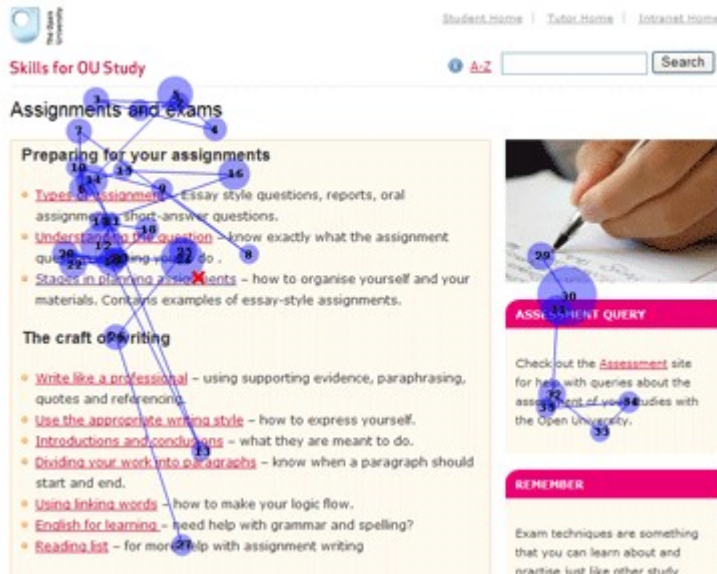
Looking for 'planning'
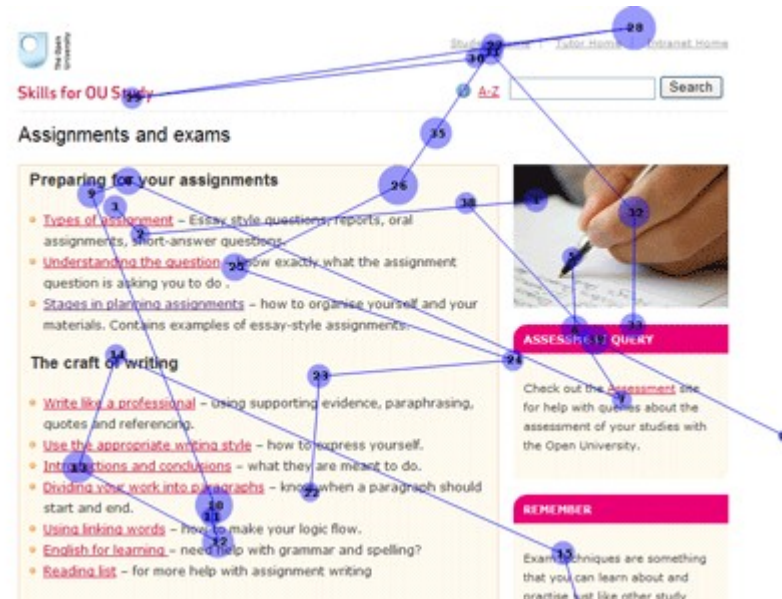
Looking for 'contact us'

If the form is going well, no need to look elsewhere

Prospectus Request

If you need HELP please email General-Enquiries@open.ac.uk or call us on +44 (0)845 300 6090

Order for myself

We have filled in your address (amend where necessary). Please complete the details below

Fields marked * must be filled in

Address*	11 Bloomfield Way
Town/City*	TAMWORTH
County	Staffs
Postcode	B79 8LS
Title*	(Choose)
Other title	
First name*	
Last name*	
Gender*	(Choose)
OU Personal Identifier (if known)	
Date of birth (DD MM YYYY)	[ ] - [ ] - [ ]
Daytime phone number	
Evening phone number	
Mobile phone number	
Email Address	

Which of these subject areas are you most interested in studying with the Open University? — (Choose)

Which of these best describes your reason for enquiring about study with the Open University? — (Choose)

When would you like to start studying with the Open University? — (Choose)

How did you find out about us?
Please tell us how you found out about our website

If the promotion you saw has a response code please enter it here (e.g. UGCXYZ)...

If you do not have the response code in which publication/website did you see our promotion? — (Choose)

proceed

Make sure 'page furniture' is there for users when they need it

- Page furniture is the stuff on the page that isn't the form

- When users swap tasks, they look in the page furniture
    - "Who are you?"
    - "I want to contact you"
    - "I want help"
    - "How do I save the form?"

- It helps users if the items they need
  are in familiar places:
    - "Contact us"   header or footer
    - "Search"   top right (next best: top of left margin)
    - "Help"   top right of page
    - Your logo   top left corner

Back to labels.
The 'narrow focus' means big jumps for the users' eyes.

Postcode   B79 8LS

Title*

Other title

First name*

Last name*

Gender*

OU Personal Identifier (if known)

Date of birth (DD MM YYYY)

Daytime phone number

Evening phone number

Mobile phone number

Mario Penzo's recommendation:
"Place labels above or right-align them"

Penzo, M (2006) Label Placement in Forms
http://www.uxmatters.com/MT/archives/000107.php
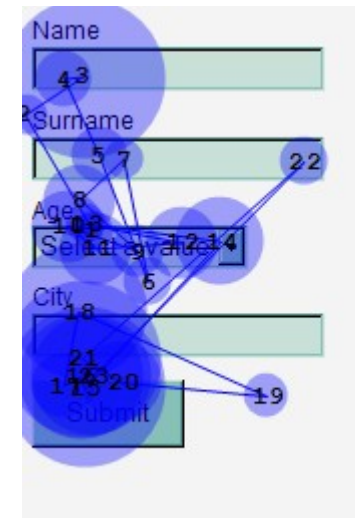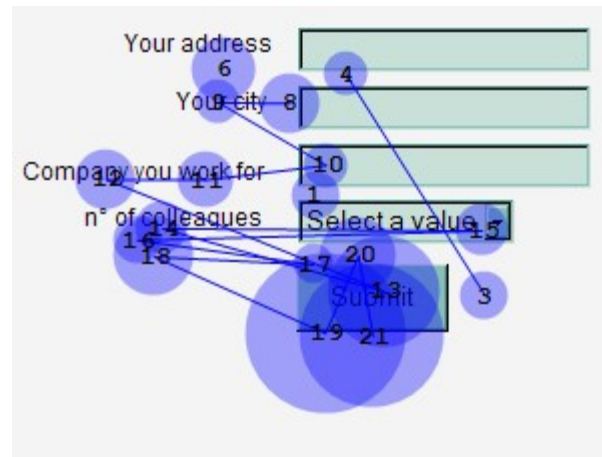
Are all these questions equivalent?
Where do the answers come from?

- Your address

- Your city

- Company you work for

- Number of colleagues

- Your address

- Your city

- Company you work for

- n^o of colleagues

- Name

- Surname

- Age

- City
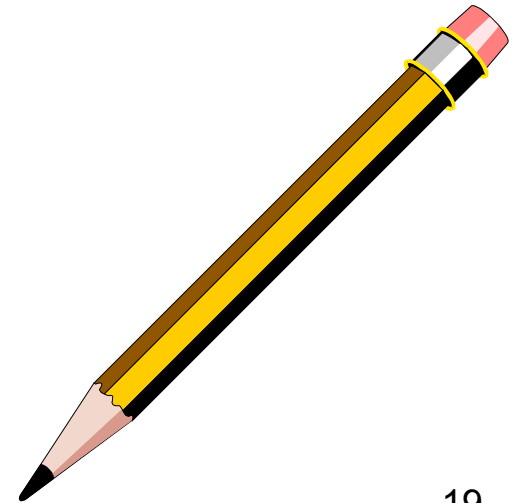
Easy questions and hard questions prompt different patterns of reading

- Users glance at populated answers

- Users look mostly at the left end of the answer space for easy questions

- Users read complex instructions quite carefully...

- ... provided they are on the way to their goal

Update:
Labels above the fields may be no faster than right aligned labels

- Das, McEwan and Douglas investigated label placement

- Chose a simple form with simple questions

- Found no difference between labels above the fields and right-aligned labels

Das, McEwan and Douglas (2008)
Using eye-tracking to evaluate label alignment in online forms,
NordiCHI '08: Proceedings of the 5th Nordic conference on Human-computer interaction: building bridges

A section of a form where I think left-aligned labels really are necessary

Did you receive any **interest** etc, for example, from UK banks, UK building societies, UK unit trusts? * [Yes ▼]

Did you receive any **dividends**, for example, UK companies, authorised unit trusts, open-ended investment companies, foreign companies (up to £300)? * [Yes ▼]

Did you receive any **UK pensions, annuities** or **state benefits**, for example, state pension, occupational pension, retirement annuity, incapacity benefit? * [No ▼]

Did you receive any **other UK income**, for example, Employment lump sums, Share schemes, Life insurance gains, Any other income? * [No ▼]

Have you made any **income tax losses** in the year 2007-08? * [No ▼]

Are you liable to **pension savings tax charges** or have you received payments from overseas pension schemes? * [No ▼]

Users can survive a lot

Checkout   Step 1: Billing and Shipping Address

*Indicates a required field

If you are a new customer complete this form.

Billing Address

[ ]
Title (Mr., Mrs., Miss, etc.)

[ ]   [ ]
* First Name   * Last Name

[ ]
Company

[ ]
* Address Line 1

[ ]
Address Line 2

[ ]
Address Line 3

[ ]
* City/Town

[ ]
* Postal Code

[United Kingdom v]
*Country

[ ]
* Daytime Phone Number

[ ]
* E-mail Address (must be accurate for us to send your order confirmation)

Shipping Options

◉ Ship entire order to my billing address

○ Ship entire order to ONE address (other than my billing address)

○ Ship items in this order to MORE THAN ONE address

Catalogue Code

If you have a printed catalogue, please enter the catalogue code from the blue box on the back of the catalogue (See below).

CATALOG CODE

CUSTOMER CODE

WEB COUPON CODE

[ ]
Catalogue Code

Coupon Code

If you have a printed coupon to apply to your order, enter the code here:

[ ]
Coupon Code

Continue

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Method 1 (more effort):
Decide where to put your labels according to your users, their goals, and the questions

Your users and their goals	Your questions ...	Put the labels ...
Willing to reveal the answers; filling in the form helps them to achieve a goal	Simple, only a few of them	Above
	Simple but lots of them	Right-justified
	Complex	Left-justified
Unwilling to reveal answers or reluctant to fill in the form	Simple or complex	Left-justified (you'll need more explanation)

Submit a Complaint

AARP Elder Watch
A Program with the Colorado Attorney General and the AARP Foundation

● **Home**

Do you have a fraud or financial exploitation concern?
Complete this complaint form or call us Monday - Friday 9am to 4 pm
Toll Free in Colorado: **1-800-222-4444**
Denver Metro: **303-222-4444**

If using this form, please note that labels in **bold with an asterisk (*)** are required

Your Information

* First Name: [   ]

* Last Name: [   ]

Phone Number: [   ] (nnn-nnn-nnnn)

Email: [   ]

Would you like to receive a status update?   ○ Yes ◉ No

* Relationship to Victim: [Select One... ▼]

* Type of Complaint: [Select One... ▼]

* Estimated Amount of Financial Loss: [0   ] (to the nearest $)

* Are you the Contact?   ○ Yes ◉ No

Will you share your fraud experience with the public in order to help others?   ○ Yes ◉ No

How did you hear about us?   [Select One... ▼]

Contact Information

* First Name: [   ]

* Last Name: [   ]

* Phone Number: [   ] (nnn-nnn-nnnn)

Email:

Screenshot best
available

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Basecamp®   37signals

You're just 60 seconds away from your new Basecamp account.

Already use a 37signals product? Then sign in with your 37signals ID to save time.

1 Create your Basecamp account

First name [   ]

Last name [   ]

Email [   ]

Company [   ]
(Or non-profit, organization, group, school, etc.)

Time zone [(GMT-05:00) Eastern Time (US & Canada) ▼]

Now choose a username & password

Username
[   ]
This is what you'll use to sign in. (or use OpenID)

Password
[   ]
6 characters or longer with at least one number is safest.

Enter your password again for verification
[   ]

2 Create your Basecamp site address

Every Basecamp site has its own web address. For example, if you want your Basecamp site to be at
http://acme.basecamphq.com you'd enter acme in the field below. **Letters & numbers only.**

http:// [   ] .basecamphq.com

Thanks for choosing Basecamp!

You're in good company when you use 37signals products.

Over 3,000,000 users
Thousands sign up every week

Secure and reliable
Your data is backed up daily

Great customer service
Fast, accurate, and friendly help

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Interlude

by kind permission of

Steve Krug, author of

"Don't Make Me Think" and

"Rocket Surgery"
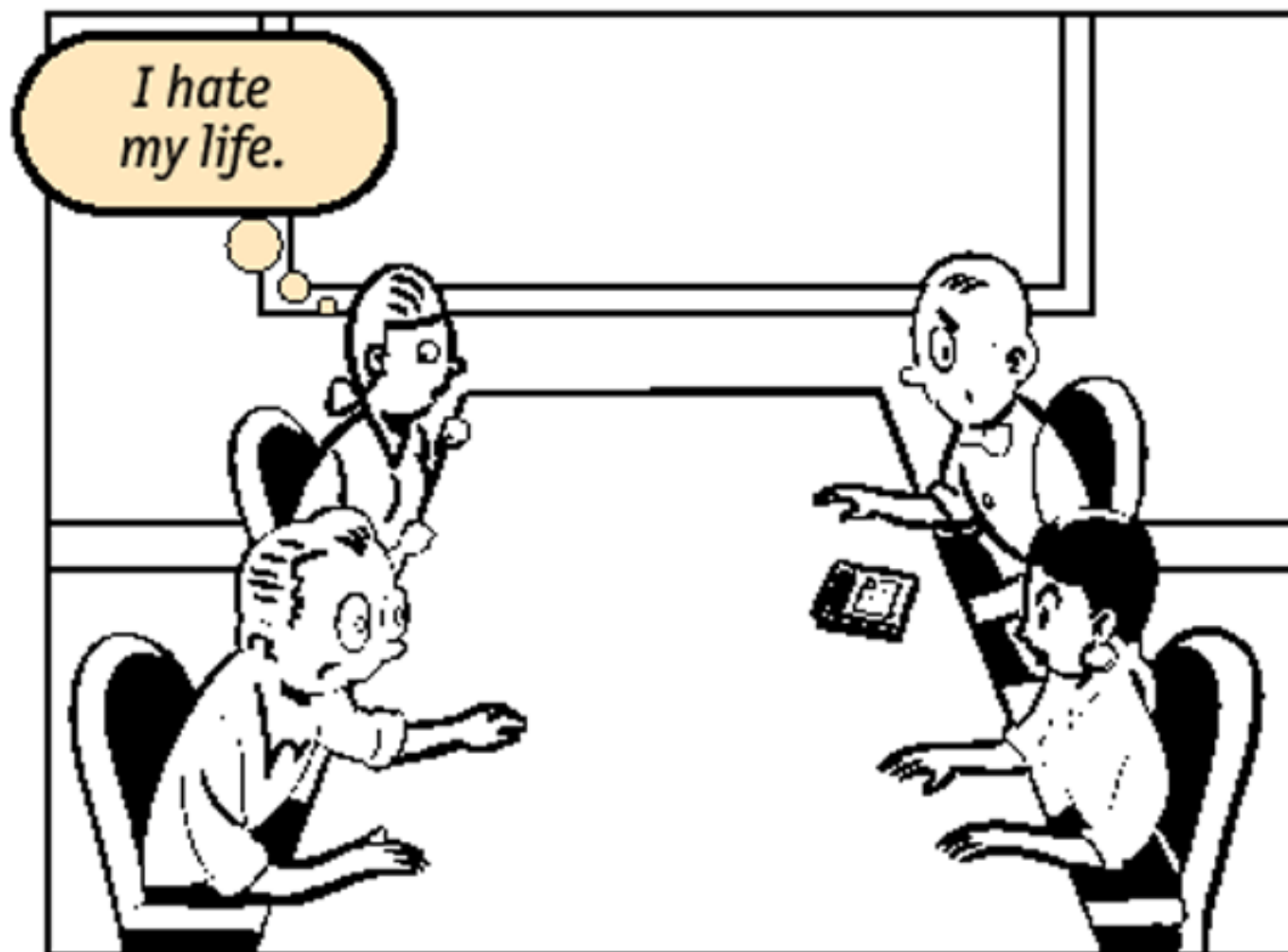
As you'd expect, Steve goes on to recommend usability testing

- Usability testing gets you away from 'religious wars'

- Even one test with one (possibly unrepresentative) is better than nothing

Back to label placement

Method 2 for labels (guaranteed success): Choose anything harmonious then test and test

- Any reasonably harmonious arrangement of labels and boxes is likely to be OK

- The only guaranteed way of achieving a good form is:
  - Test YOUR form with YOUR users
  - Make changes based on what you find
  - Test again with (different) users
  - Make more changes
  - Repeat until the form works

Let's stress about details

Colons at the end of labels?

Sentence or title case?

Required field indicator?

Colons at the ends of labels are a matter of considerable debate

Pick one style. Stick with it. It's not worth arguing about.

Sentence or title case?
Sentence case wins. (But only just).

- This is sentence case

- This is Title Case

- This Is Capitalisation Of Each Initial Letter

- ISO-9241 part 17 says
  - "Initial upper-case (capital) letter for field labels: To facilitate readability, the text field labels begin with an upper-case letter. The rest of the label should contain lower case (small) letters except for cases where the label is a logo, an acronym or language convention that requires each word in the label to begin with a capital letter."

- Sentence case is slightly more legible due to familiarity

- It's not worth changing a big suite of forms to fix this

http://www.usabilitynews.com/news/article2594.asp

Required field indicator?
(There's a theme developing here...)

- ## Miriam Frost Jungwirth:

  - "I was once charged with testing that.
    Seriously. $10,000 of manhours testing asterisk placement.

    There was no difference in user performance. At all."

- ## I'm a little more interested in this discussion:

  - Indicators placed to the right are likely to be invisible
  - Put the text describing the indicator at the **top** of the **fields**
    (that is, not at the end of the form and not in the instructions)
  - Use the same indicator in both places (text and next to required field)
  - Use the alt-text 'required' (not 'asterisk')
  - Always indicate required; don't switch to indicating 'optional'
  - If you feel the urge to indicate 'optional', use the word 'optional'
  - Do not use colour on its own as an indicator

Miriam Frost Jungwirth, posting on CHI-WEB, 19 April 2007

A few examples of required field indicators

A few examples of required field indicators

A few examples of required field indicators

A few examples of required field indicators

Which is the most important problem

- Examine the Michigan Department of Transport form

- Find as many usability problems as you can

- Decide which ONE problem is the most important
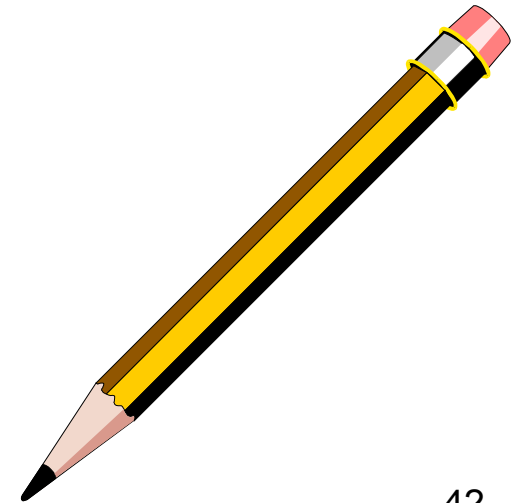
Three details that do affect users

1. It's not OK and I don't want to Cancel

2. Shorter preambles

3. 'False ends'

Buttons really do matter to users.

1. Label the button with what it does.
2. If the user doesn't want to do it,
don't have a button for it.

- "OK" works – if it makes sense to say "OK" at that point

- "Reset" probably doesn't work

    - Reset Button: INPUT TYPE=RESET

      An INPUT element with `TYPE=RESET' represents an input option, typically a button, that instructs the user agent to reset the form's fields to their initial states. The VALUE attribute, if present, indicates a label for the input (button).

      When you are finished, you may submit this request: <input type=submit>

      You may clear the form and start over at any time: <input type=reset>

When you are finished, you may submit this request:
  Submit Query

You may clear the form and start over at any time: Reset

http://www.w3.org/MarkUp/html-spec/html-spec_8.html#SEC8.1.2.8

Three details that do affect users

1. It's not OK and I don't want to Cancel

2. Shorter preambles

3. 'False ends'

A/B testing

Varied:

- photo
- background
- colours
- shading
- buttons
- preamble

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In our 2004 study, we found that only a better preamble made any real difference

- We tested a wide selection of visual variants of a form

- Variants improved conversion rates

- The only variation that achieved statistical significance was the improved preamble:
  - Shorter
  - Clearer
  - Better layout

Jarrett, C. and Minott, C. (2004) *Making a better web form* Proceedings of the Usability Professionals' Association Conference, Minneapolis, Minnesota, USA. http://www.formsthatwork.com/files/Articles/BetterForm.pdf

You're just 60 seconds away from your new Basecamp account.

Already use a 37signals product? Then sign in with your 37signals ID to save time.

1 Create your Basecamp account

First name

Last name

Email

Company

(Or non-profit, organization, group, school, etc.)

Time zone (GMT-05:00) Eastern Time (US & Canada)

Now choose a username & password

Username

This is what you'll use to sign in. (or use OpenID)

Password

6 characters or longer with at least one number is safest.

Enter your password again for verification

2 Create your Basecamp site address

Every Basecamp site has its own web address. For example, if you want your Basecamp site to be at http://acme.basecamphq.com you'd enter acme in the field below. **Letters & numbers only.**

http://   .basecamphq.com

Thanks for choosing Basecamp!

You're in good company when you use 37signals products.

Over 3,000,000 users
Thousands sign up every week

Secure and reliable
Your data is backed up daily

Great customer service
Fast, accurate, and friendly help

28 words

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Three details that do affect users

1. It's not OK and I don't want to Cancel

2. Shorter preambles

3. 'False ends'

'False ends': if it feels like the end of the conversation, users will stop

'False ends': if it feels like the end of the conversation, users will stop

HM Revenue & Customs

contact us   help ?   logout

21 March 2007 EFFORTMARK LTD (Ref 362/E365) £

P46 - Tax Code Calculation

Tax Year 2005/2006

home

⊕ Back

> Employee List
> Works Number
  Update

**Employer Annual
Returns**
> P35 End of Year
> P38A
  Supplementary
> P11Db Expenses &
  Benefits
> P9D Batch
  Submission
> Employer Actions

Settings
> Employer Details
> Change Tax Year

P46 New Employee
> Statements
> **Tax Code
  Calculation**

> Feedback

Susan Roberts
AB631452C

Based on the information provided, the tax code to be used for this employee is shown below.

Tax code to be used: **503L**

Tax code operation basis: **week 1 or month 1**

Do another P45, P46 >

Submit P45, P46 form(s)>

⊕ Back

Avoid screens in the middle of forms that have no fields for user entries

- Option 1: save a 'false end' screen for the true end of the conversation

- Option 2: include a question that guides users around the 'false end' screen

Now try it for yourself

- Design a solution to the 'false end' in the tax form
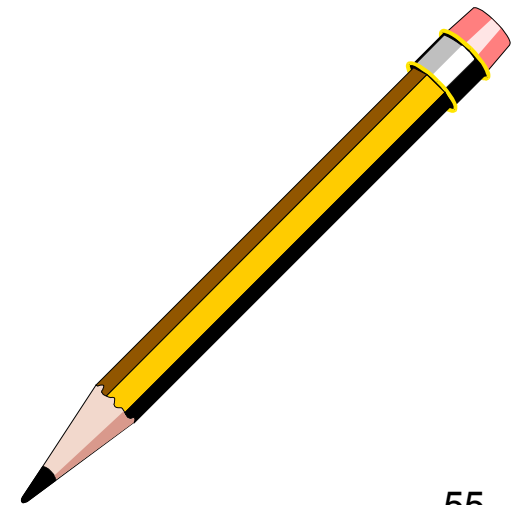
If it looks good, it's easy to use

Keep the logo in proportion

Calm your creative impulses

Design to a grid

Use rules with a light touch

Some branding reinforces your form's credibility.

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Is this enough?

Where is the form?
Too much branding

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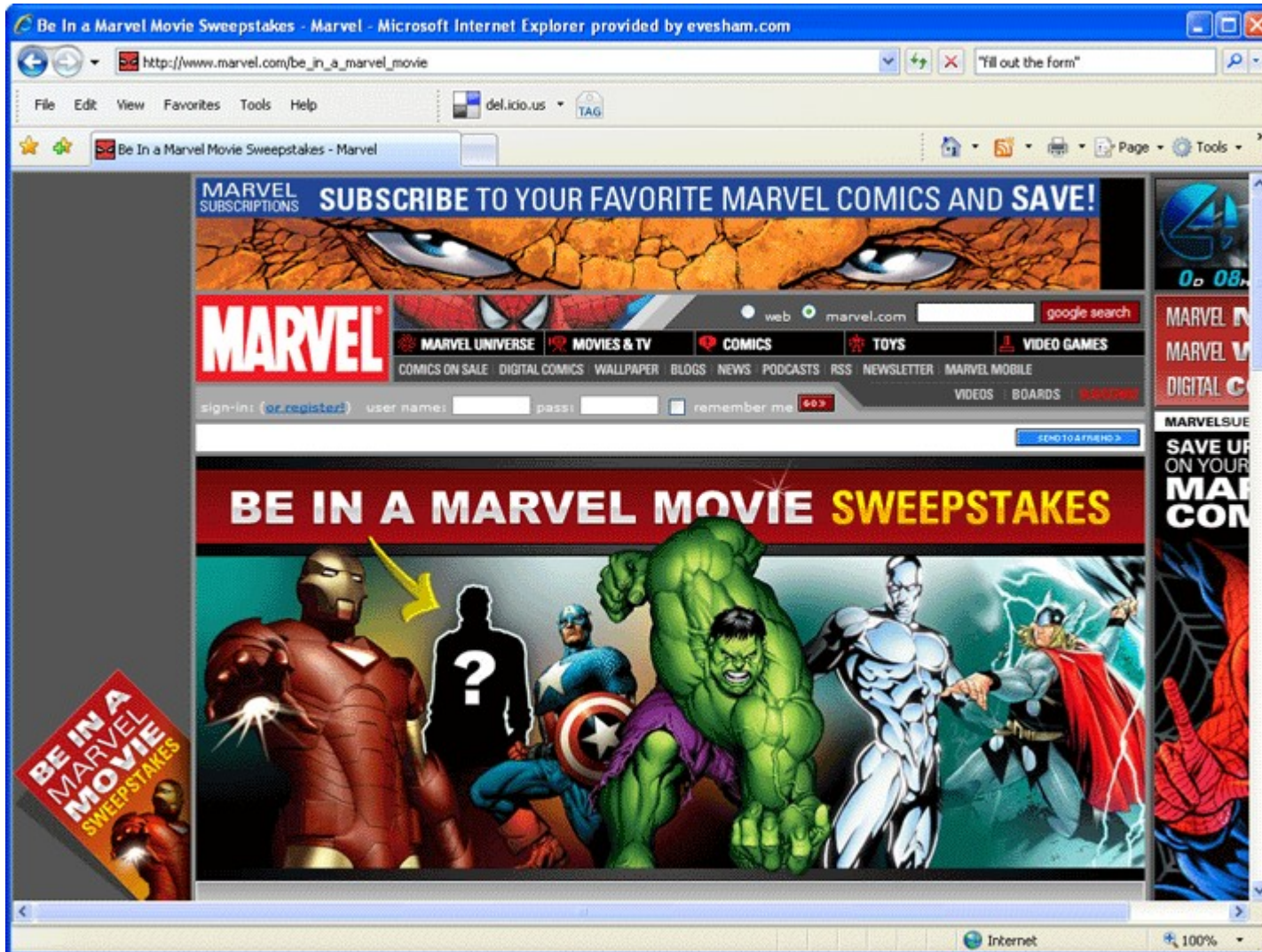
Another, more recent, look at the Marvel site
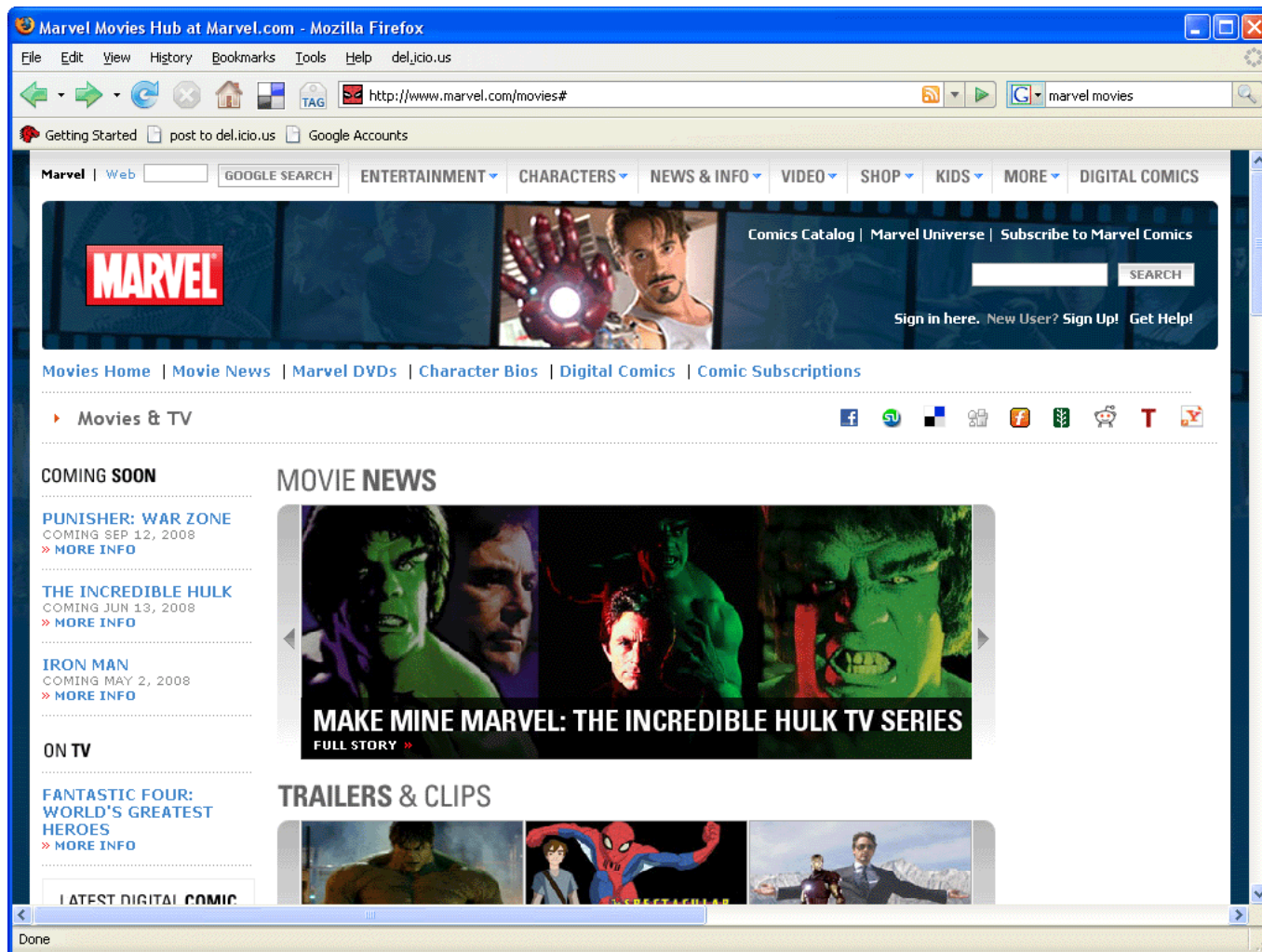
Another, more recent, look at the Marvel site
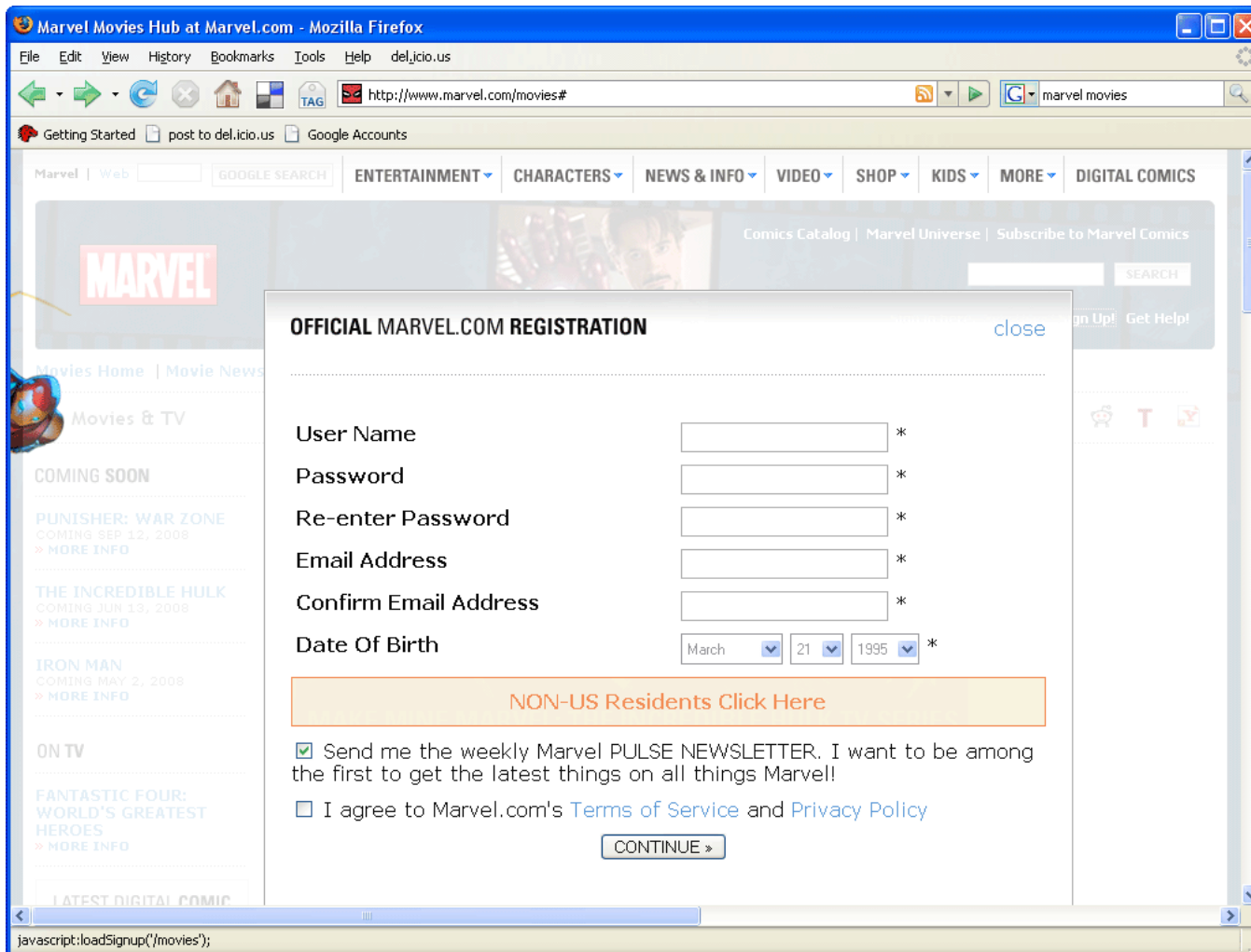
Is this just right?
Or too much?

If it looks good, it's easy to use

Keep the logo in proportion

Calm your creative impulses

Design to a grid

Use rules with a light touch

Calm your creative impulses.

More conventional: easier to use, still offers opportunities for improvement

If it looks good, it's easy to use

Keep the logo in proportion

Calm your creative impulses

Design to a grid

Use rules with a light touch

Design to a grid: work with the graphics in the shape of the page
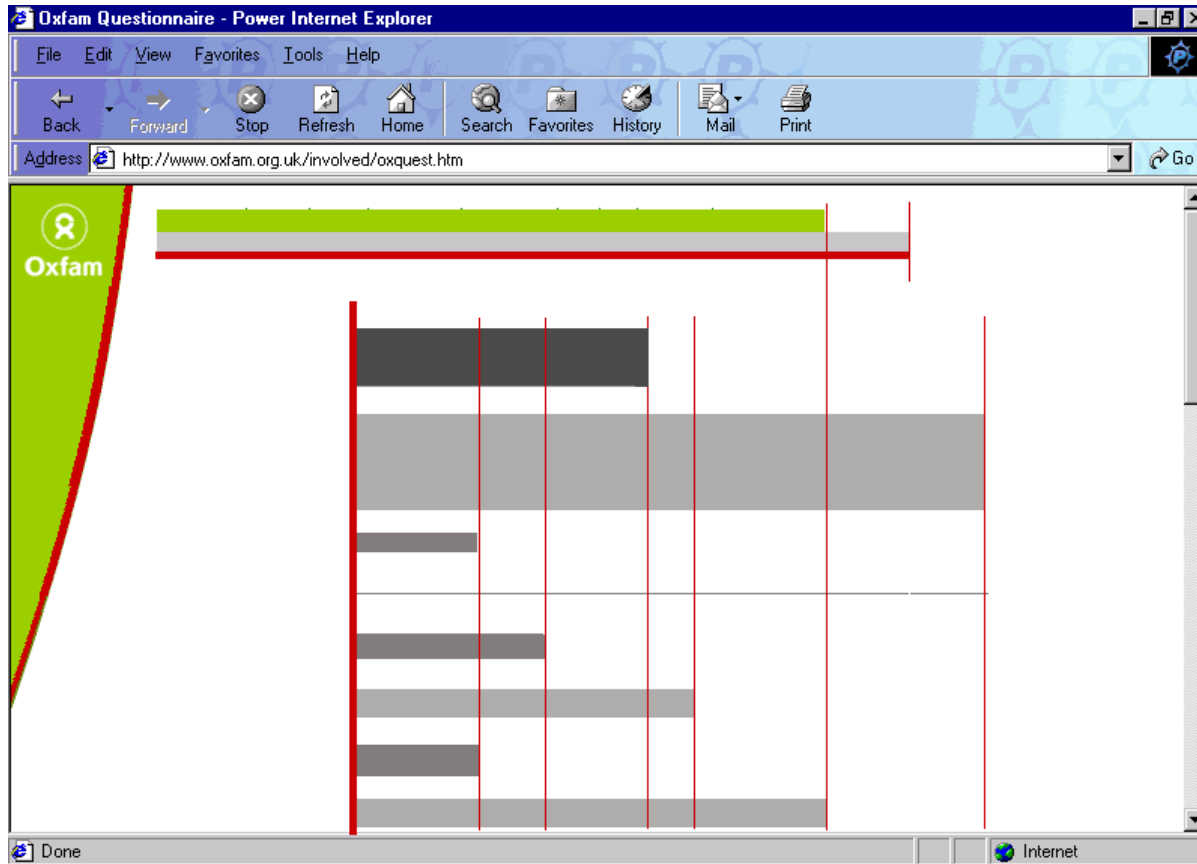
Keeping to a grid: starts well
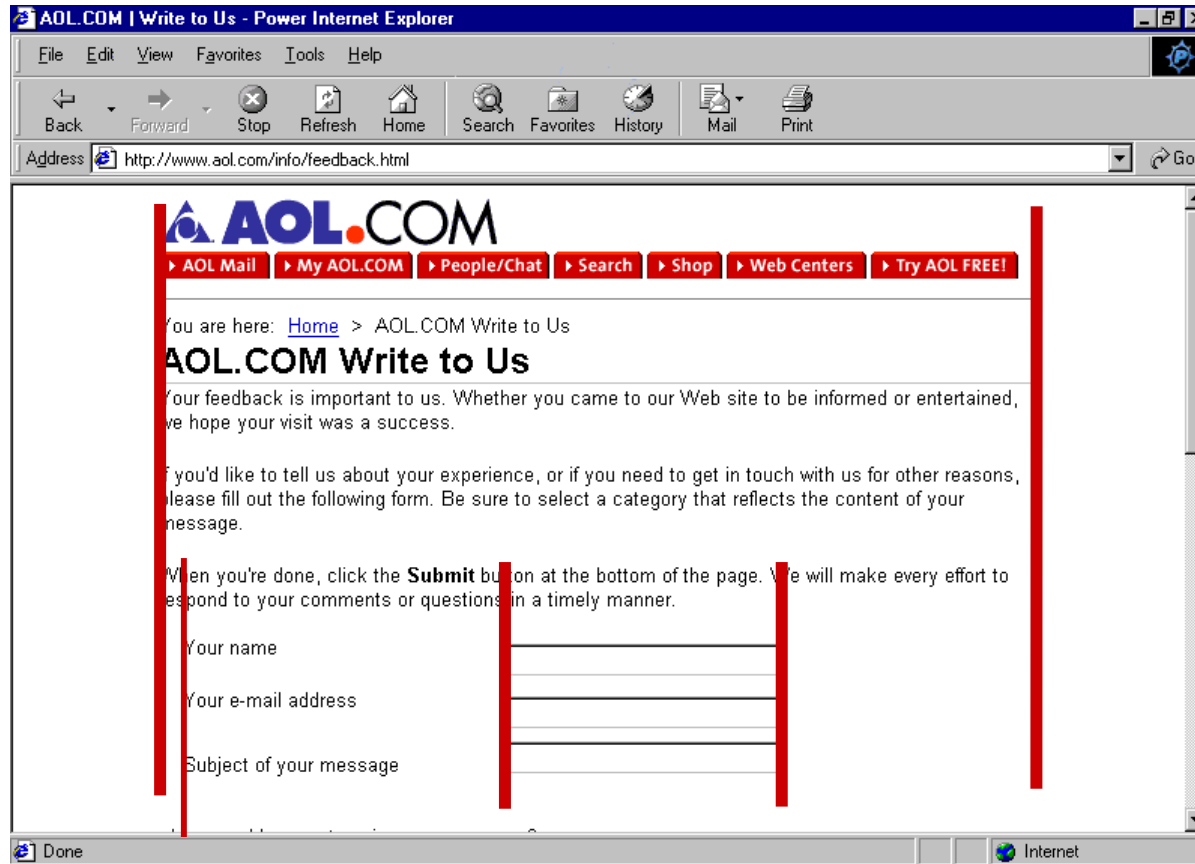
Example: chipping at the grid

Design to a grid:
if you give up entirely, it looks a bit inept

Design to a grid:
if you give up entirely, it looks a bit inept

A before- and after- example.
First of all, the old one. Plenty of grid problems.

Currently:
tidied up, and with page furniture
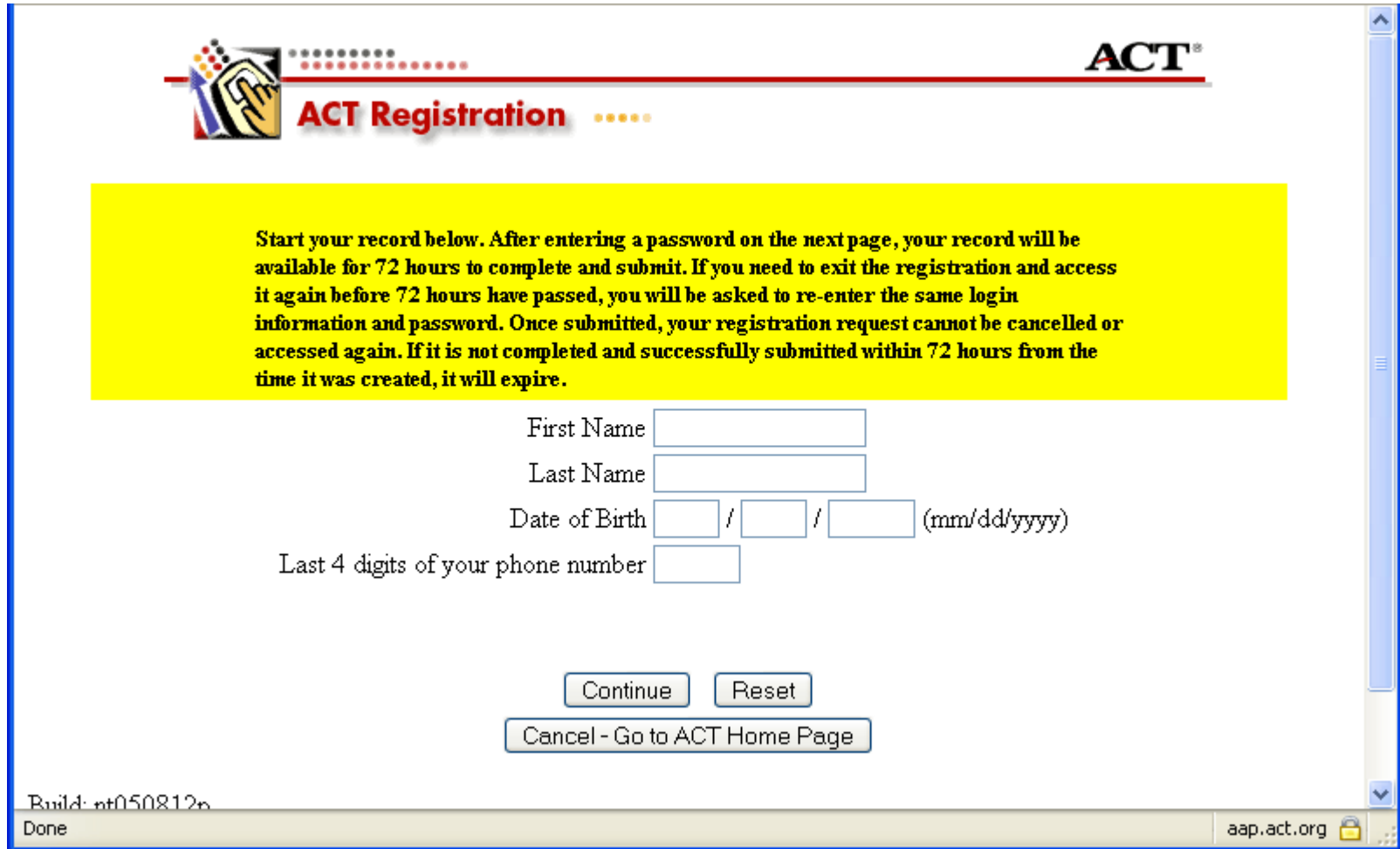
Design to a grid:
think about the whole page as well as the fields

Design to a grid:
now it has a grid – but also invisible instructions

Now try it for yourself

- Design a solution for 'invisible instructions' on the ACT form
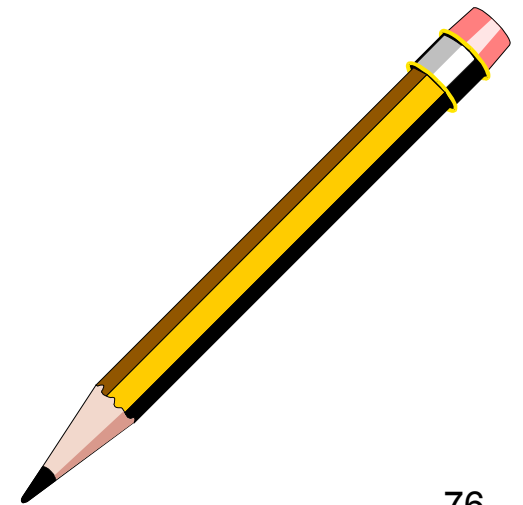
If it looks good, it's easy to use

Keep the logo in proportion

Calm your creative impulses

Design to a grid

Use rules with a light touch

Taking out some lines can help

- This is a USA tax form

- I thought it looked disorganised

Drawing the grid shows problems

- This shows just a few lines on the grid

- I could easily draw five times as many

Back to the form

Try lining it up and lightening up

- In this version:
  - removed some lines
  - lined up as many as possible
  - replaced some with grey lines

1040X before and after (maybe?)

Another rules experiment: better or worse?

Another rules experiment: better or worse?

Another rules experiment: better or worse?

A final thought on rules:
the famous 'Butterfly' ballot
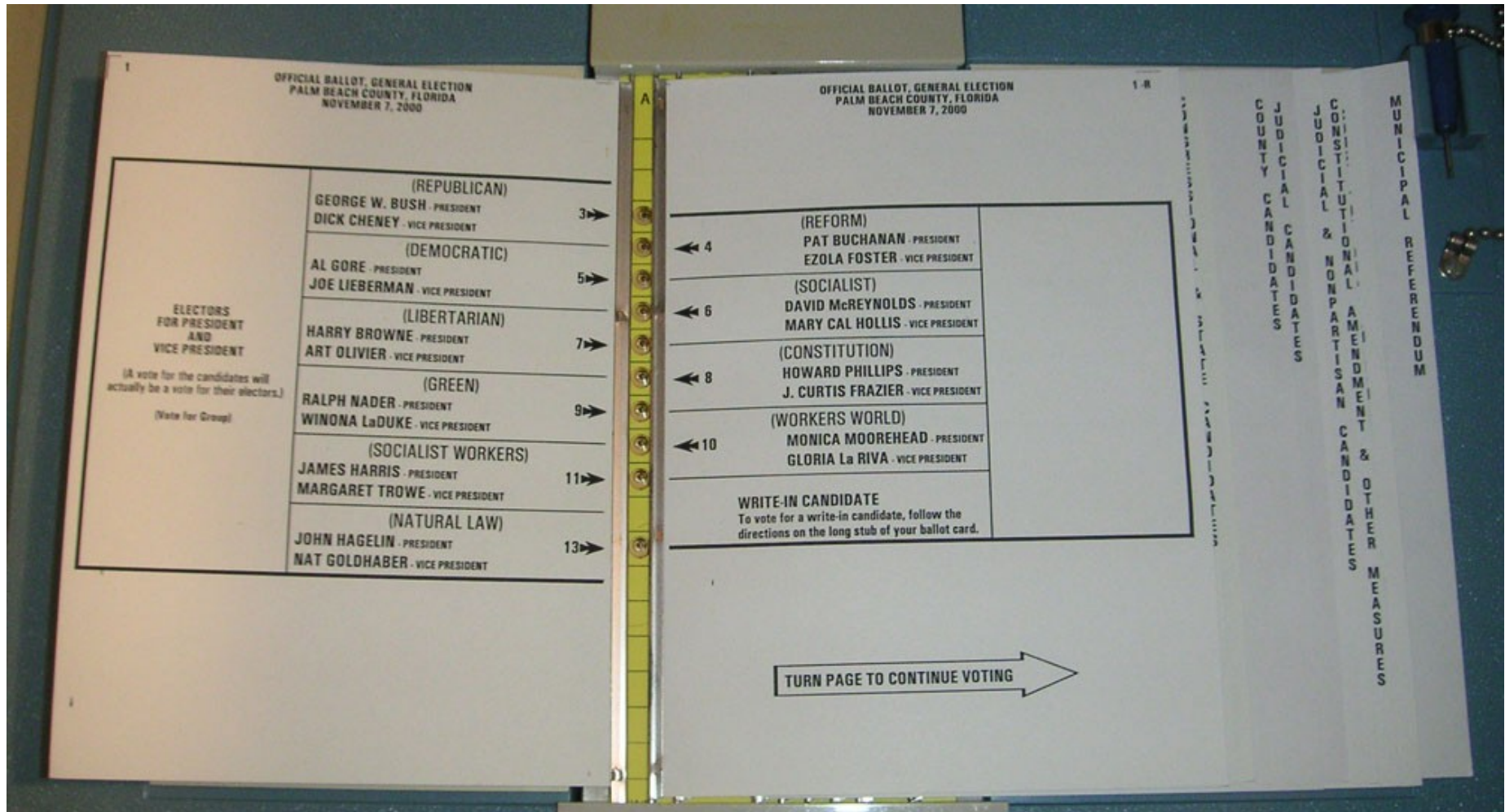
Most statistical analyses claim that the Buchanan vote was anomalous; some do not

Figure A.5 Votes for Buchanan in all Florida counties in 2000 presidential election, relative to the number of registered reform party voters (based on data provided by Sebago Associates, 2000).
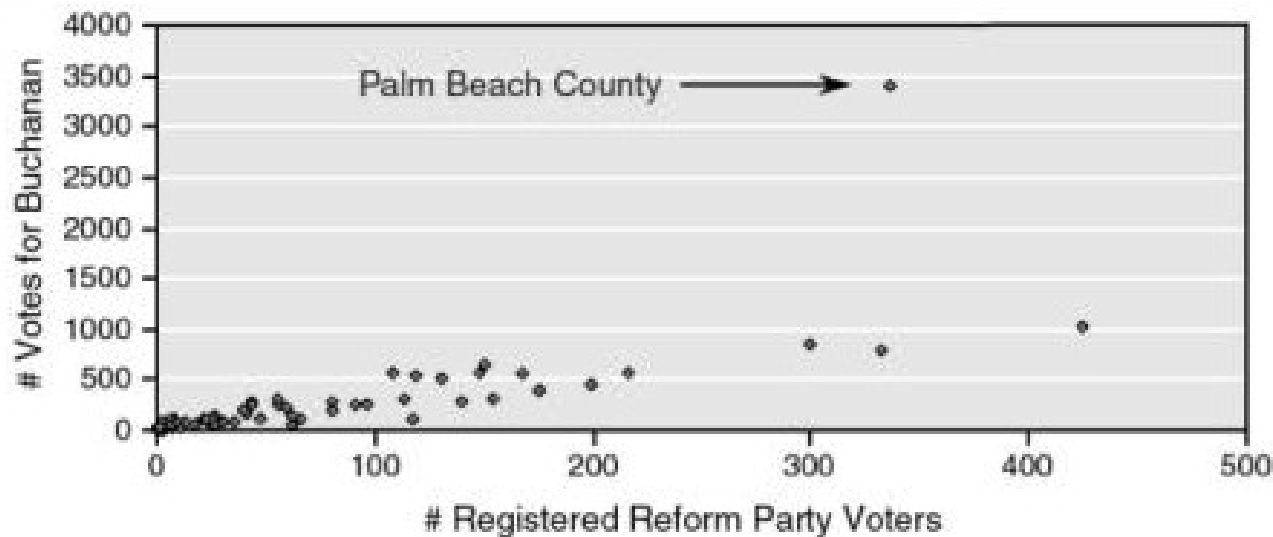
The final words

A cautionary tale

What really matters to users

A cautionary tale: actual user behaviour on your real form beat all guidelines

- Background
  - A new form for a UK government department
  - Followed all my own guidelines and ideas

- Tested with 5 participants

- The results
  - Five out of five filled in the whole form, even though the guidance should have directed them elsewhere
  - Four out of five never found out what they were applying for
  - They still considered it was pretty easy on the whole

It's what you ask and why that really matters

- Users rarely abandon forms because of:
  - Label placement
  - Use of colons
  - Required field indicators
  - Sentence or title case

- Users often abandon forms or lie on them because of:
  - Questions that they don't understand
  - Questions that they have no answer for
  - Intrusive questions that are inappropriate to the task
  - Validations that refuse their preferred or correct answer

Question time

Caroline Jarrett

carolinej@effortmark.co.uk

+44 1525 370379

I'm a consultant, hire me:

Consultancy:	www.effortmark.co.uk
Training:	www.usabilitythatworks.com

Free stuff:

Forms advice:	www.formsthatwork.com
Editing:	www.editingthatworks.com
Columns:	www.usabilitynews.com
	"Caroline's Corner"

Effortmark