# *Designing usable online forms*

Discussion group led by Caroline Jarrett

BCPW 10

# Caroline Jarrett

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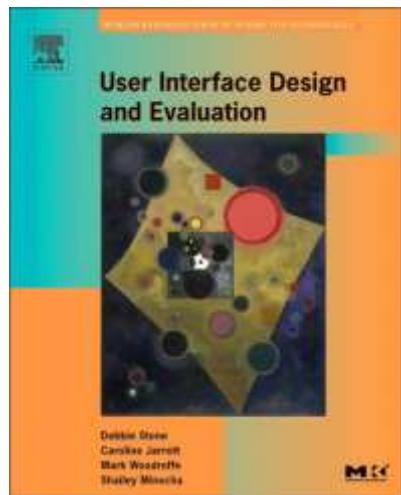
Stone, Jarrett, Woodroffe and Minocha (2005)

User interface design and evaluation

Morgan Kaufmann
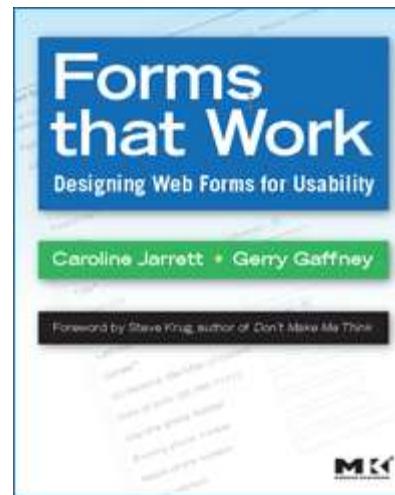
Jarrett and Gaffney (2008)

Forms that work: Designing web forms for usability

Morgan Kaufmann

Consultancy: www.effortmark.co.uk

Forms advice: www.formsthatwork.com

Training: www.usabilitythatworks.com

Editing tips: www.editingthatworks.com

Designing for people who do not read easily: www.designtoread.com

Council forms are often quite complicated

A lot of advice for designing forms is about forms like this…

So what happens when we have to work with forms like this?

Discussion topic #1: Complexity

- How many of your forms are complex?

- What makes them complex?

- Tips for reducing complexity?

Complexity affects all three layers of the form

- Relationship:
  - More than one user involved
  - Stressful or unclear consequences
  - Must be kept up to date
- Conversation:
  - Questions about difficult concepts
  - Variety of sources for the answers
  - Variable sections depending on earlier answers
- Appearance:
  - Multiple pages
  - Multiple sections within pages

Relationship

| Understand users and their goals | ⟷ | Get the answers the organisation needs |

Conversation

| Write good questions | ⟷ | Write helpful instructions |
| Choose the right controls | ⟷ | Make the form flow easily |

Appearance

| Visual details: labels, colons | ⟷ | Make the form look easy |
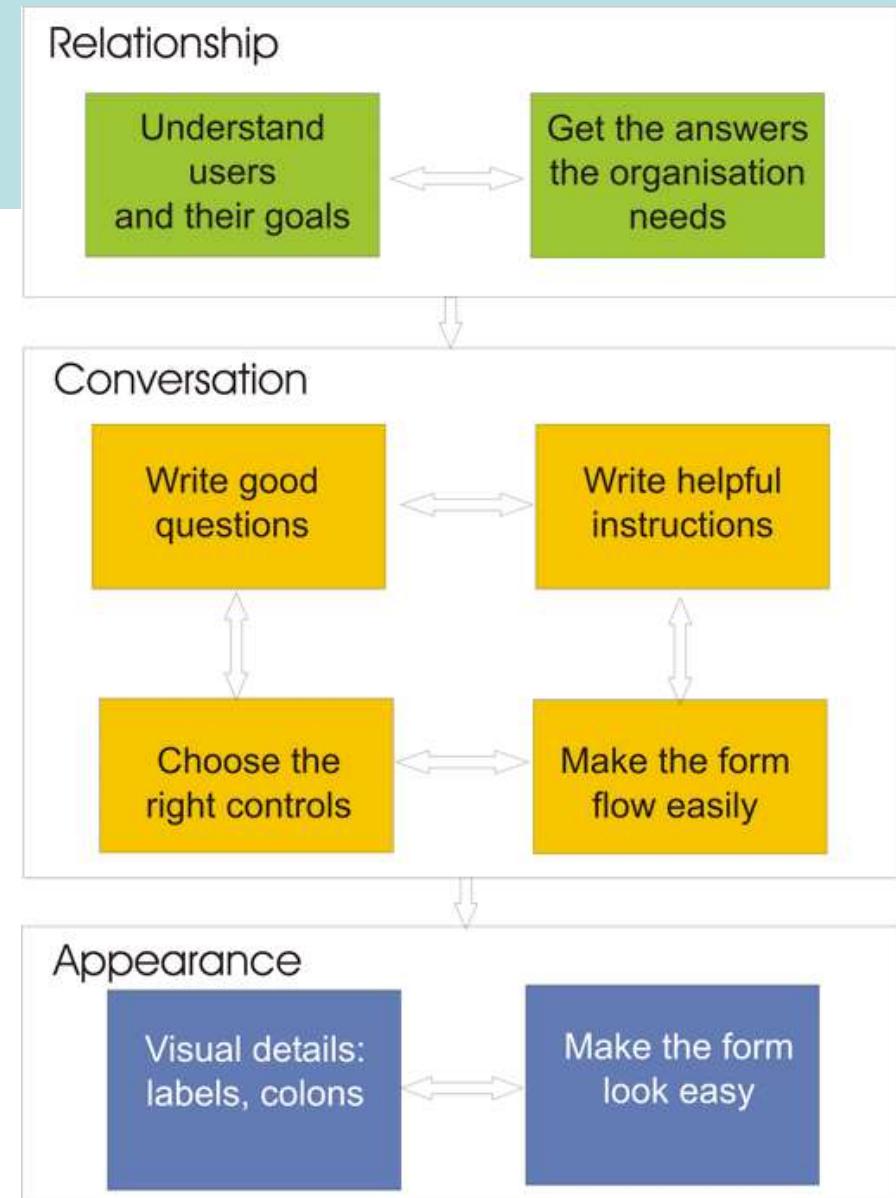
Discussion topic #2: Designing for complexity

- Given that some complexity is inevitable, what to do?

- Tips for a better process for creating/updating forms?

- Tips for better forms at each level:
  - Relationship?
  - Conversation?
  - Appearance?

Three tips

- Try a 'replay study' where users go back over a complex form with you

- Use a summary menu instead of a progress indicator

- Segment the form by topic; and if multiple users are involved, by user

More resources

- Web sites:
  - Our forms advice web site
    http://www.formsthatwork.com
  - Robert Barnett (worked extensively on government and complex forms)
    http://www.rbainformationdesign.com.au/free_papers.html
  - Jessica Enders (short, research-based articles)
    http://formulate.com.au/articles/
  - Luke Wroblewski (interaction and visual design)
    http://www.lukew.com/ff/index.asp

- Slides at http://www.slideshare.net/cjforms
  - "Design tips for complex forms"
  - "E-forms: saving work or creating stress
  - These notes