



Forms design: what matters to users?

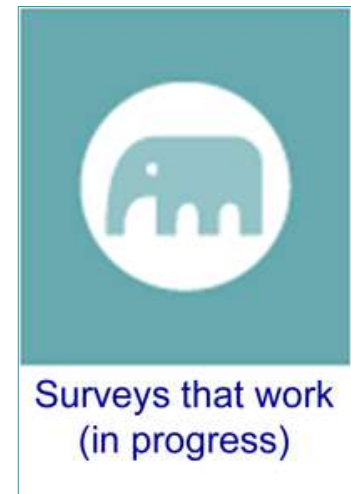
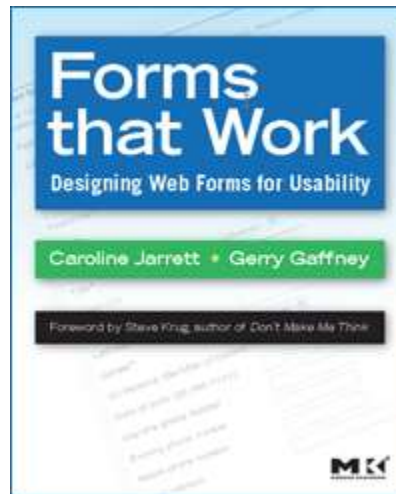
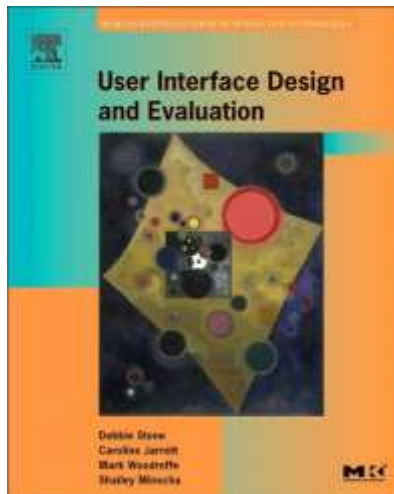
Caroline Jarrett

Seminar with MSc students, University of York

Caroline Jarrett

twitter @cjforms

caroline.jarrett@effortmark.co.uk



Feedback on preparation:

students chose some papers to read and commented

- “Should I use a drop-down?”
 - (Allen Miller and Jarrett, 2001)
 - <http://www.formsthatwork.com/files/Articles/dropdown.pdf>
 - Useful, mostly to help educate/persuade someone else
- “Setting usability requirements for a website containing forms”
 - (Allen Miller and Jarrett, 2002)
 - <http://www.formsthatwork.com/files/Articles/2001-AllenMiller-Jarrett-Set-reqts.pdf>
 - OK, but not clear how to act on the content recommended
- “Designing usable forms: the three-layer model of the form”
 - (Jarrett, 2000)
 - <http://www.formsthatwork.com/files/Articles/DesigningUsableForms.pdf>
 - Crucial paper, model for how to think about forms
- “How to make your shopping cart suck less”
 - (The Oatmeal, 2010) - warning, contains very coarse language
 - http://theoatmeal.com/comics/shopping_cart
 - Fun way to get some good advice about one type of form, if you don't mind the style

Agenda

Let's stress about details

Try some testing

Try some harder testing

Try some redesign

A detail that matters to users


Final reminder: it's what you ask and why that really matters

Lots of discussion about colons and labels

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

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Create an Account (Required)

Choose a Member ID:

Choose a Password: (Five character minimum)

Re-enter your Password:

Secret Question: [What's this?](#)

Secret Answer:

E-Mail Address: [Why do we need this?](#)

NYTimes.com will only use this address with your permission.

☒ Remember my Member ID and password on this computer.

Choose a Member ID:

Choose a Password:

Re-enter your Password:

<http://www.usabilitynews.com/news/article3200.asp> and
<http://www.usabilitynews.com/news/article3112.asp>

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

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 of the field 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 full word 'optional'
- Do not use colour on its own as an indicator

An example of required field indicators at the wrong end of the field

Department of
MDOT Transportation

Michigan.gov
An Official State of Michigan Web Site

Michigan.gov Home | MDOT Home | Site Map | Contact MDOT | FAQ | State Web Sites

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 - Prequalification**
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- > Local Agency Program
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bridges, borders & ferries

news & information

projects & programs

Printer Friendly | Text Version | Email Page | A- A+ Text Size

Order a Construction Prequalification Packet

To request a prequalification packet via email, fill in this form and click the Submit button below. * **REQUIRED INFORMATION**

Name: *

Email: *

Company: *

Address: *

Address 2:

City: *

State: * ZIP: *

* Required

Departments/Agencies

Online Services

Surveys

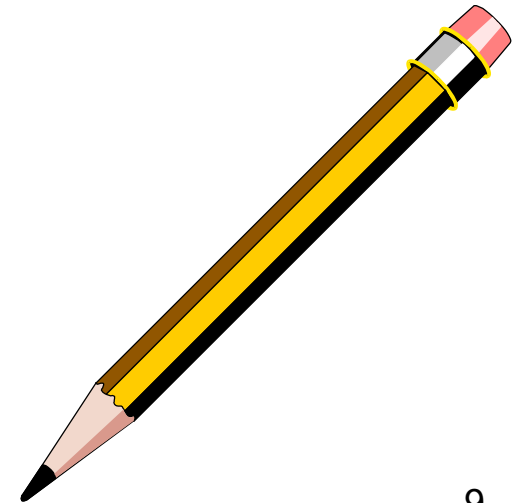
RSS Feeds

Related Content

- How to Become Construction Prequalified
- MDOT Prequalified Contractor Directories

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



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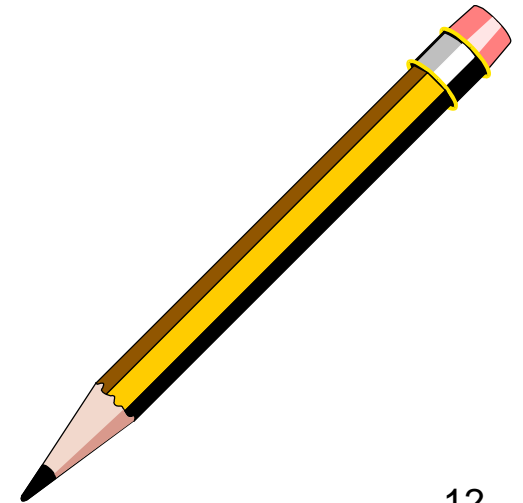
How to look at a form

1. Don't look at it (yet)
2. Decide on a persona and scenario
3. Think about:
 - The differences between that persona and scenario and the most typical person in the target audience and what they want to do
 - How different you are from that persona and scenario
4. Now try using the form 'in character'
 - Make notes as you go
5. Review the experience
 - Relationship
 - Conversation
 - Appearance

Jarrett, C and Quesenbery, W (2006) "How to look at a form",
Proceedings of the UPA conference Minneapolis

New website for finding and recommending user experience books

- Each team, start by creating your persona and scenario:
 - Decide on a topic you want to research
 - Decide on a book you'd like to recommend
- Organise your test session:
 - Nominate one of you as participant
 - The other one becomes observer/note-taker
- Go to it!



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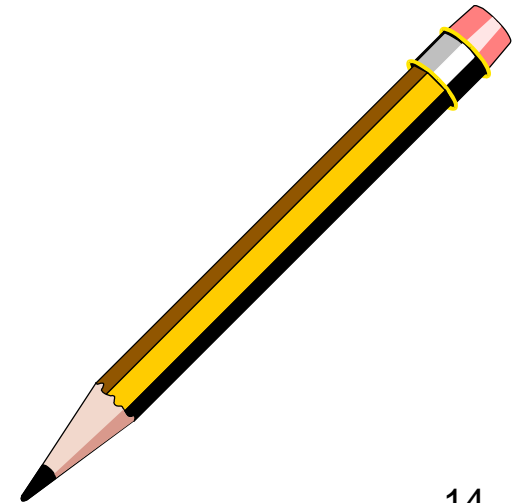
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Forms for getting help at home for an elderly person

- Why does this count as 'harder' testing?



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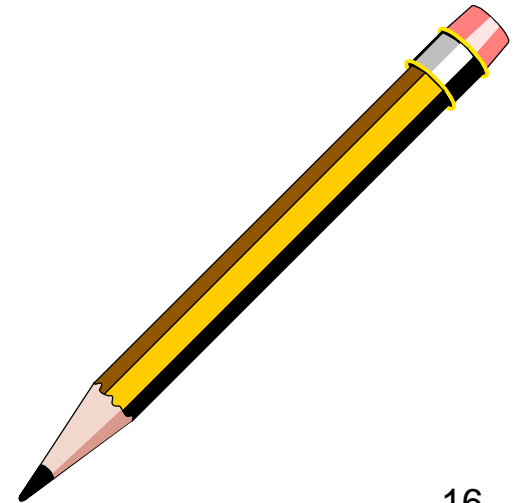
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Easy to critique, harder to fix

- We reviewed the Basecamp 'before' form
- Article with the 'before' and 'after' forms
- <http://37signals.com/svn/posts/1867-design-decisions-new-signup-form>



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Request a Personalized Rate Quote

Tired of calling a list of mortgage providers only to be asked the same questions over and over again? Let our lenders and brokers come to you! By providing the following information, one or more companies in your area will provide a "personalized quote" on your borrowing request. Most will respond in less than 24 hours. Please complete this form as thoroughly as possible.

We respect your privacy. This is a confidential request and your personal information will only be sent to lenders and brokers in your area who are customers of CompareInterestRates.com. For more information, see our [privacy statement](#).

Property State

Please Choose One

Purpose of loan

Please Choose One

Preferred mortgage product

Please Choose One

(If you want quotes on multiple products please indicate additional products in the comment field below)

Approximate loan amount you wish to borrow \$

(Please use whole numbers without any commas, decimals or dollar signs)

Purchase price of home or approximate value for a refinance \$

(Please use whole numbers without any commas, decimals or dollar signs)

If purchasing a new home you have identified, when is the closing date?

Contact Information:

First Name

Last Name

Home Phone #

Business Phone #

Email Address

Please rate your credit

Please Choose One

Are you willing to document your income throughout the loan process?

Yes I will document my income for the lender

Have you ever had a bankruptcy?

Never have had a bankruptcy or over 10 years since BK discharge

Additional information, comments, and questions.

Do you wish to also receive quotes on home owner's insurance?

No

Do you wish to subscribe to our Daily Mortgage Rate Update email?

No

Please press submit button only once. Multiple submissions may transmit your request to more lenders than you requested.

Submit Your Personalized Rate Quote Request

Start Over

A/B testing

Varied:

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


COMPARE

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800-368-1234

1-800-368-1234

Request a Personalized Rate Quote



This mortgage rate quote form will take approximately 30 seconds to complete. Here's how our service works:

- Complete our short form
- We will search hundreds of mortgage lenders and thousands of loan programs in our database
- You will then receive quotes from up to 4 competitive lenders in your state
- You choose the mortgage lender with the best rate and loan terms and save money

Property State

Please Choose One

Purpose of loan

Please Choose One

Preferred mortgage product

Please Choose One

(If you want quotes on multiple products please indicate additional products in the comment field below)

Approximate loan amount you wish to borrow \$

(Please use whole numbers without any commas, decimals or dollar signs)

Purchase price of home or approximate value for a refinance \$

(Please use whole numbers without any commas, decimals or dollar signs)

If purchasing a new home you have identified, when is the closing date?

Contact Information:

First Name

Last Name

Home Phone #

Business Phone #

Email Address

Please rate your credit

Please Choose One

Will you document your income? Yes No

Have you ever had a bankruptcy? Never

Additional information, comments, and questions.

Submit Information To Lenders

Please press submit button only once. Multiple submissions may transmit your request to more lenders than you requested.

Copyright © Compare Interest Rates 1999-2003. All Rights Reserved.

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

Sign up

A variety of plans to fit everyone's needs. You can upgrade, downgrade, or cancel any time.
All pay accounts include a 30-day Free Trial.

Create your administrator account

This is the master log-in for your account. All fields are required. Once your account is set up you can add accounts for other people as well. Each person will have their own username and password.

First name

Last name

Email

Username

What you'll use to log in (or [use OpenID](#)).

Password

Password again

Confirm your password by entering it again.

Company/Group

Examples: Apple, UCLA, Red Cross

Time zone

Which web browsers work with Basecamp?

Any of the following web browsers work with Basecamp: **IE 7** (PC), **Firefox 2** or later (Mac, PC, or Linux), **Safari 2** or later (Mac).

Can I upgrade, downgrade, or cancel later?

Absolutely. Basecamp is a month-to-month service so you can upgrade, downgrade, or cancel at any time.

Which forms of payment do you accept?

We accept Visa, Mastercard, and American Express. We do not accept POs, checks, or invoices to be paid at a later date. We do email a "PAID" invoice each time you are billed.



66 words

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 

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

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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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It's what you ask and why that really matters

- The form will certainly fail if the users can't find it
- 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

Thanks
and
please
contact me

Caroline Jarrett

carolinej@effortmark.co.uk

+44 1525 370379

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“Caroline’s Corner”

www.uxmatters.com

“Good Questions”