

Design tips for forms

Workshop: Ideas for improving
the UX of complex transactions

Workshop results



These slides are from a workshop at the UX Cambridge conference, September 2013.

We had some lively discussions and talked a lot about what makes forms complex or simple.

This version of the slides captures some results at a high level.

Many thanks to all the attendees for their contributions.

Four people with inspiring ideas about forms



Agenda

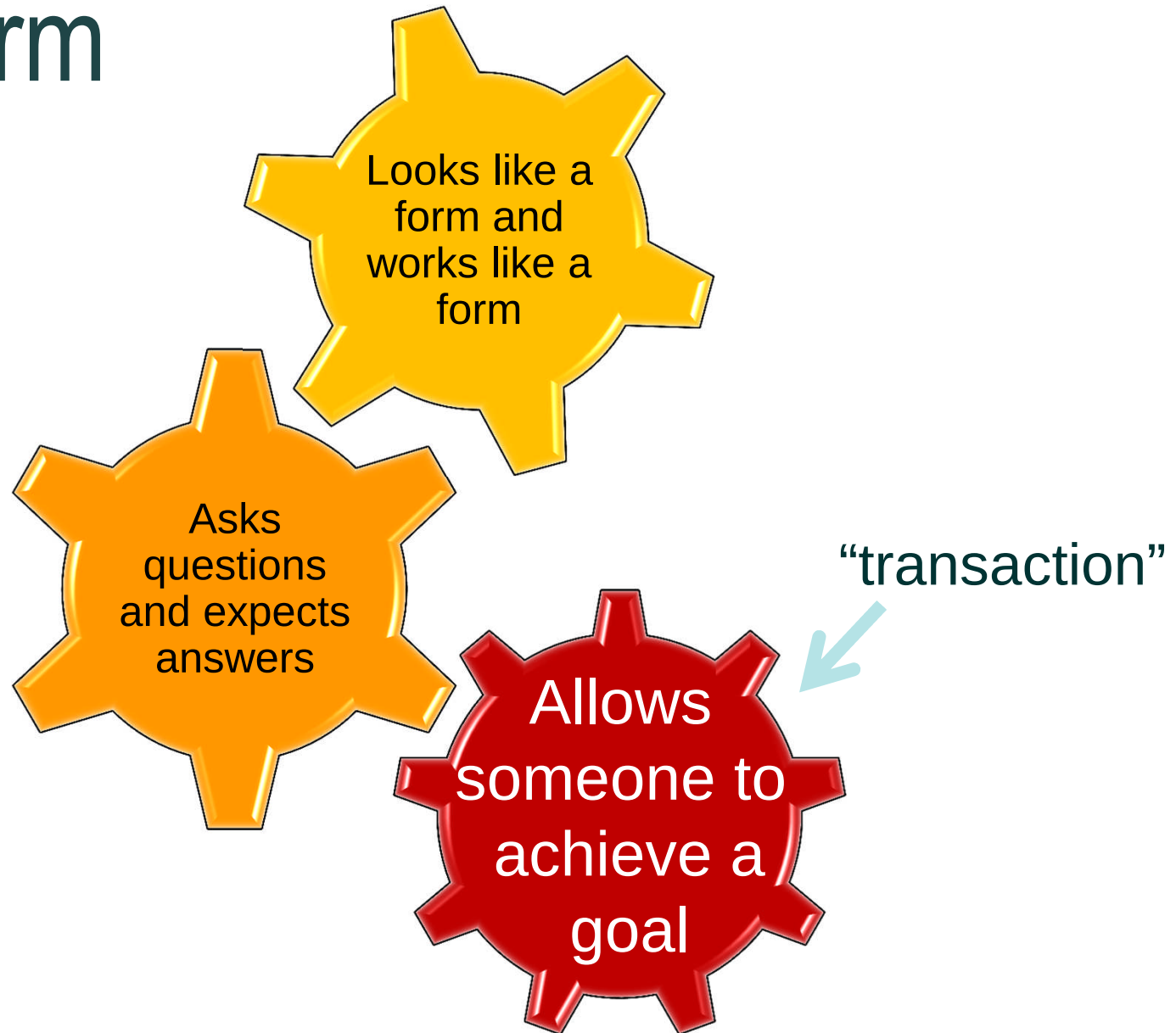
‘Complex’ and ‘simple’ in forms

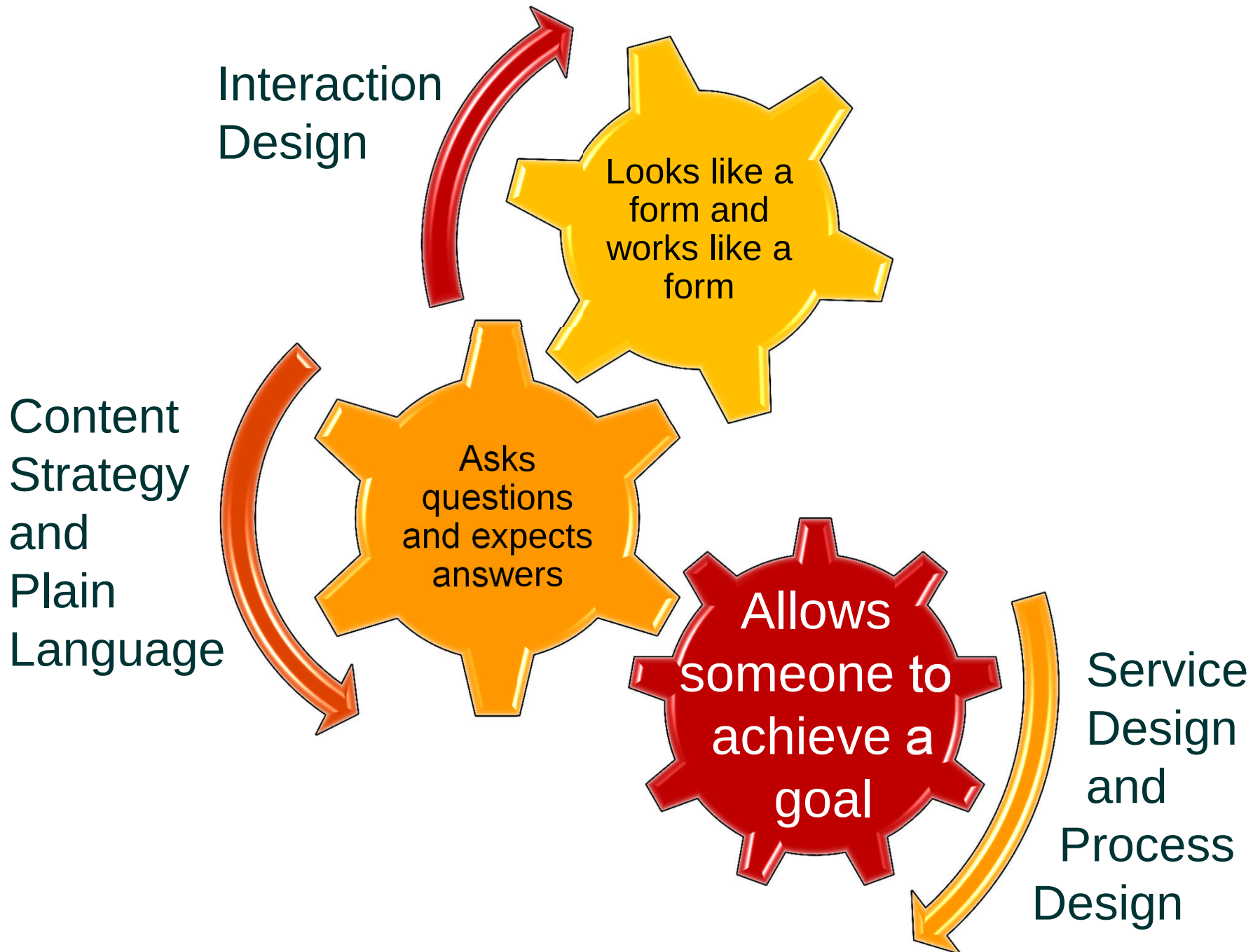
Users and usage of complex forms

Conversation and flow in complex forms

Appearance of complex forms

It's a form if it ...





Where you
put the pixels

Looks like a
form and
works like a
form

The questions
you ask

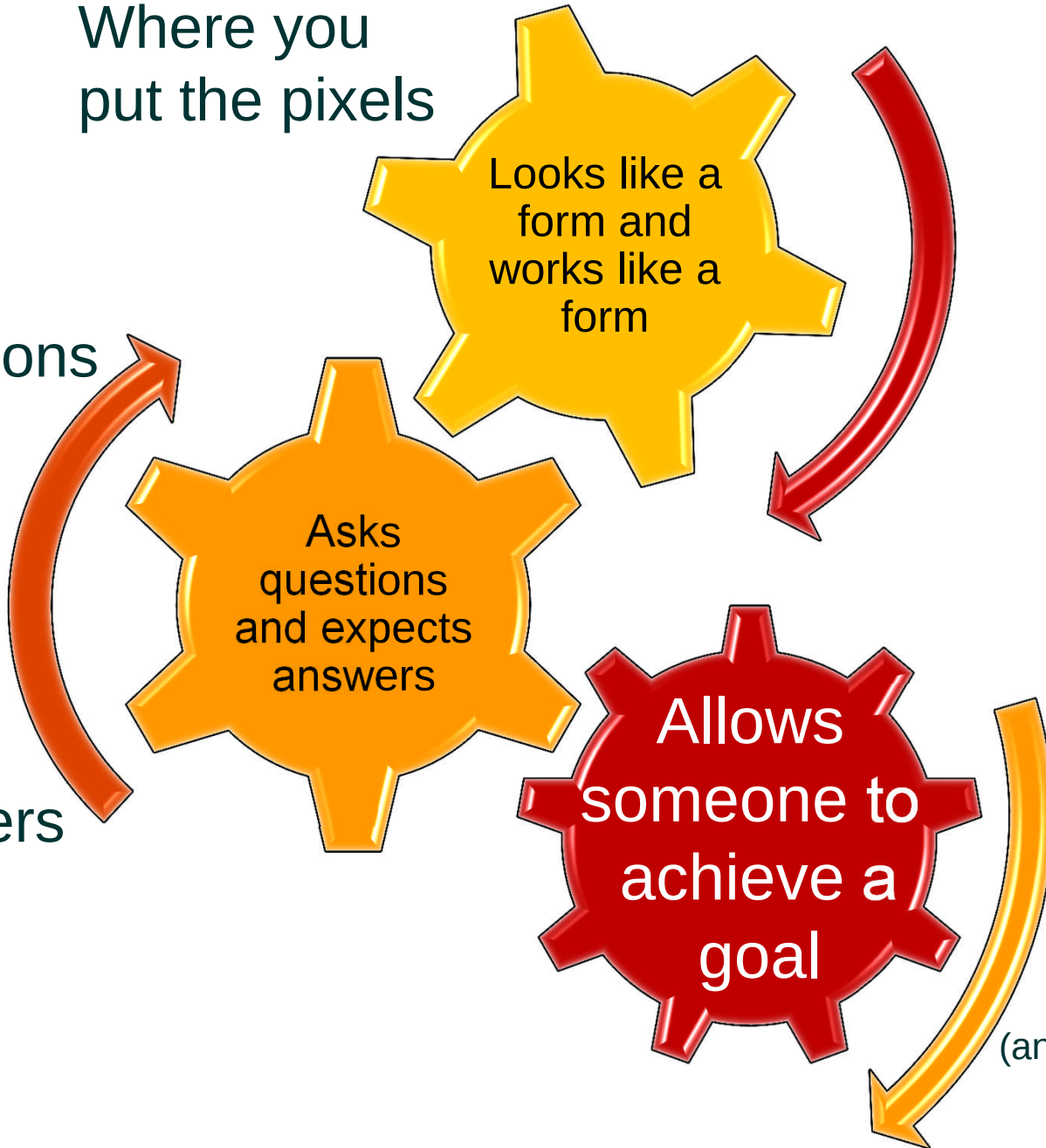
Asks
questions
and expects
answers

The answers
you need

Allows
someone to
achieve a
goal

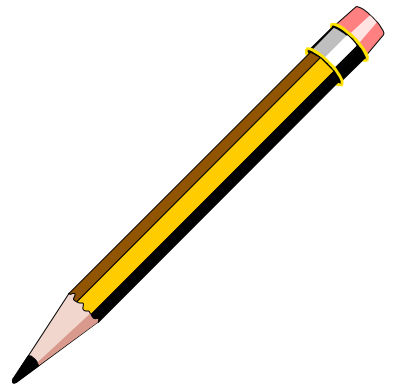
Users'
goals

(and business ones)



Let's start with a few forms

- Three forms coming up....
- Is the form simple or complex?
- Why?



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- Check your usage between bills
- Set up and access your BT Extras

All you need is:

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- Your BT account number

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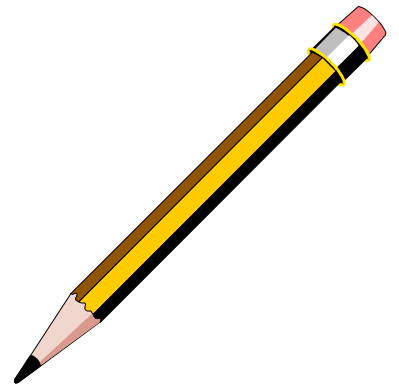


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What makes a form complex?

- Compare your ideas within your teams
- Pick the top three to share with all of us



Workshop results



- Three teams came up with loads of ideas about what makes forms easy or difficult.
- The top choices for easier forms were:
 - Clear positioning of links / make it obvious what the next step is
 - Avoid too much information / have the right amount of information
 - Clear text and avoid ambiguity
 - Fewer fields
 - Don't make people remember yet another ID
 - Set expectations about what's needed for the form
 - Think about the users' knowledge and what's needed for the answers
 - Make it easy for users to achieve their goals
- And we need to make sure that we make the form accessible.

Most of all: if users expect it to be complex, it is.

- This form is complex.
Even though we haven't seen it yet.

Apply for a U.S. Passport



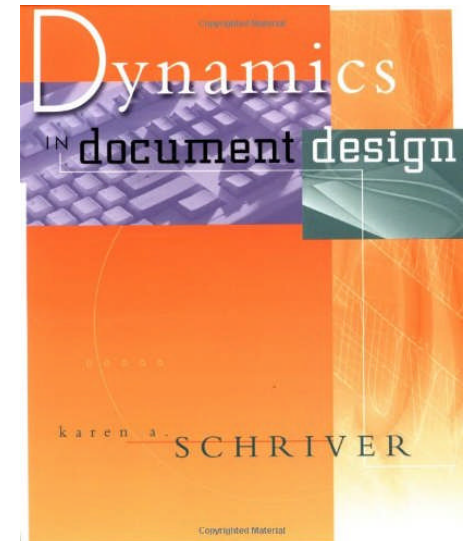
- ▶ First Time Adult Applicant
(Age 16 and Older)
- ▶ Minor Applicant (Under Age 16)
- ▶ Where to Apply in the U.S.

Four people with inspiring ideas about forms



Karen Schriver, information designer

- Follow her @firstwren
- “Information design is a process of orchestrating content visually and verbally, making the structure salient to people who engage with it.”

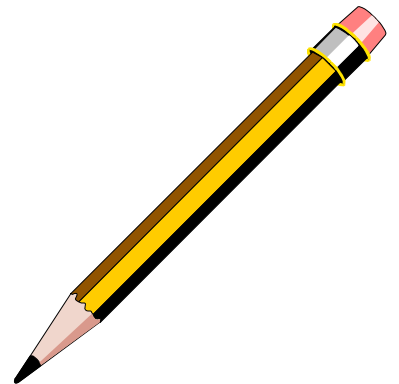


We want to organise the Candy Apple Street Festival in New York



Assign roles in the team

- Decide who you want to be for today's purposes



And this is part of our preparation


APPLICATION FOR THE INSTALLATION OF
TEMPORARY FESTOON/HOLIDAY LIGHTING AND/OR OTHER TEMPORARY LIGHTING

New York City Department of Transportation
Division of Street Lighting
34-02 Queens Boulevard, 2nd floor
Long Island City, New York 11101
Telephone: 718-786-4595

Applicant Information:		Section 1 (Please repeat this information on page 3.)	
Festival Lighting: YES	NO	Seasonal Holiday Lighting: YES	NO
Name of Sponsoring Group: _____			
Address of Sponsoring Group: _____			
City: _____		State: _____ Zip: _____	
Contact name in Group: _____		Telephone: _____	
Mayor's Office Street Activity Permit (if appropriate) #: _____ (Please attach copy of permit.)			
Electrical Contractor Performing Work: _____		License # of Contractor: _____	
Contractor 24 Hour Contact Name: _____		Telephone: _____	
Contractor's Corporate Officer Name: _____			
Address of Contractor: _____			
Location of Project: On (main roadways) _____			
Cross Streets: between _____ and _____			
Borough: _____		Number of Poles Involved: _____ (Traffic Signal Poles may not be used.)	
Dates Lighting will be Attached to Poles: From _____ to _____			
Date Lighting will be Illuminated: From _____ to _____ Wood Pole Area? Yes No			
Minimum Height of Installation above Roadway: _____ Sidewalk: _____ Feet (Please show the details of the locations of the installation heights on your drawing/map.)			

Conditions for the Installation of Temporary Festoon/Holiday Lighting and/or Other Temporary Lighting:

- It shall be the responsibility of the sponsoring group/organization and/or permittee to submit the signed and dated application with the detailed drawing directly to the Division of Street Lighting. The group's contractor shall not be permitted to submit the application and/or drawing.
- The cost and expense of all work, including any damages incurred to NYC equipment, shall be borne by the sponsoring group/organization and/or permittee.
- All work shall conform to the requirements of the New York City Department of Transportation (NYC DOT) Highway Rules (available on the NYC DOT website www.nyc.gov/dot). Please refer to Sections 2-03 and 2-14 (e) for specific provisions regarding temporary holiday lighting and other temporary lighting. This application does not include all the provisions of the rules.
- Your group/organization, contractor and/or permittee shall obtain and maintain in force an insurance policy as provided in Section 2-03 of the Highway Rules and shall indemnify and hold the City harmless from any and all claims for personal injury or property damage arising from the installation, maintenance, operation and eventual removal of the temporary lights.
- The sponsoring group shall make arrangements with the appropriate electric utility company to pay for the electricity that will be used to illuminate the temporary festoon/holiday lighting and/or other temporary lighting.



Karen talks about this form in:
Schriver, K. (2011).

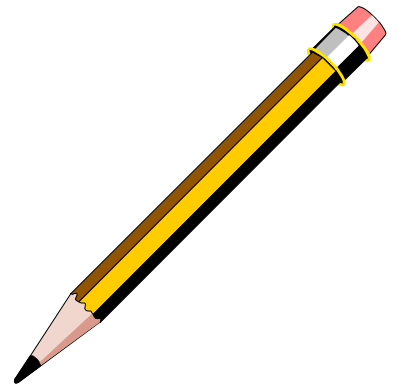
“La retórica del rediseño en contextos burocráticos. (The rhetoric of redesign in bureaucratic settings)”

In J. Frascara (Ed.),
¿Qué es el diseño de información?
(What is information design?)
(pp. 156-165).

Buenos Aires: Ediciones Infinito.

Let's test those ideas

- Do our ideas successfully diagnose whether this is a complex form or not?



Workshop results



Our top choices for easier forms – possible heuristics	Our heuristic says this form is....	Did the heuristic work?
Clear positioning of links / make it obvious what the next step is	Complex	Yes
Avoid too much information / have the right amount of information	Complex	Yes
Clear text and avoid ambiguity	Complex	Yes
Fewer fields	? Hard to say	Partly
Don't make people remember yet another ID	(Not relevant to this form)	(Not really)
Set expectations about what's needed for the form	Complex	Yes
Think about the users' knowledge and what's needed for the answers	Complex	Yes
Make it easy for users to achieve their goals	Complex	Yes
The form must be accessible	Inaccessible / complex	Yes

Agenda

‘Complex’ and ‘simple’ in forms

Users and usage of complex forms

Conversation and flow in complex forms

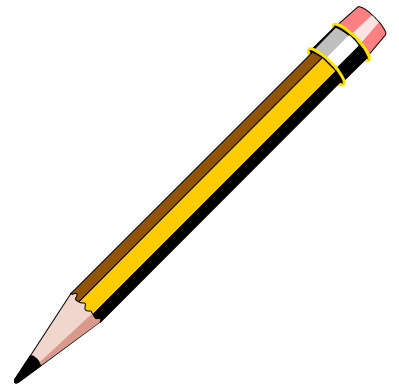
Appearance of complex forms

We know that we need to observe people as they use the forms



How to catch them at it?

- How would we find people who are planning to hold a street festival?



Workshop results



- Workshop participants had these tips for catching the right people at the right moment:
 - Recruit people well ahead of time; get them to approach you when they are at the right point to fill in the form
 - Use remote testing to catch a wider selection of people at the right moment for them
 - Use a diary study so that people record a variety of moments, including the ones relevant to your complex form



Tip

Try a 'replay study'

Users have another go at a complex form:

- In their own environment
- With their real data
- While you watch and take notes.



Observing internal users was easier in the days of paper



Tip

Track a sample of forms through your process

Look for: minimum time, maximum time, mode, errors, loops, customer contacts, staff involvement.
But most of all: for errors.



Tip

Use a question protocol to establish who uses the data

<http://www.uxmatters.com/mt/archives/2010/06/the-question-protocol-how-to-make-sure-every-form-field-is-necessary.php>

<http://bit.ly/94T9N6>

The screenshot shows the UXmatters website interface. The header features the UXmatters logo and the tagline "Insights and inspiration for the user experience community". A navigation bar includes links for Home, Articles by Topic, Issues, Glossary, Authors, About UXmatters, and Contact Us. On the left, a sidebar lists "New on UXmatters" with articles like "How a Local, SMS-based Taxi Service Earned My Loyalty" and "User Experience + Quality Assurance = Usability". The main content area displays a featured article titled "Good Questions" with a sub-header "Asking and answering users' questions" and a green checkmark icon. Below this is the article "The Question Protocol: How to Make Sure Every Form Field Is Necessary" by Caroline Jarrett, published on June 7, 2010. The article text begins with "One of the nicest things about being an author is that, from time to time, people write to say they enjoyed our book, *Forms that Work: Designing Web Forms for Usability*." A quote box contains the text: "A question protocol is a tool for finding out which form fields are required....". The right sidebar includes a search bar, a "Contact Us About" section with links to "Sponsoring UXmatters", "Writing for UXmatters", and "Joining the UXmatters Team", and a "Subscribe to Our Feeds" section with links for "RSS 2.0 Feed", "Atom 1.0 Feed", and "Follow UXmatters on Twitter".

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- Tools for Mobile UX Design

Good Questions

Asking and answering users' questions

The Question Protocol: How to Make Sure Every Form Field Is Necessary

By Caroline Jarrett

Published: June 7, 2010

One of the nicest things about being an author is that, from time to time, people write to say they enjoyed our book, *Forms that Work: Designing Web Forms for Usability*. Of course, I write back

"A question protocol is a tool for finding out which form fields are required...."

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Agenda

‘Complex’ and ‘simple’ in forms

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To get good answers,
ask good questions



Grade

The four steps of answering a question

Read the question



Find the answer



Judge the answer



Provide the answer

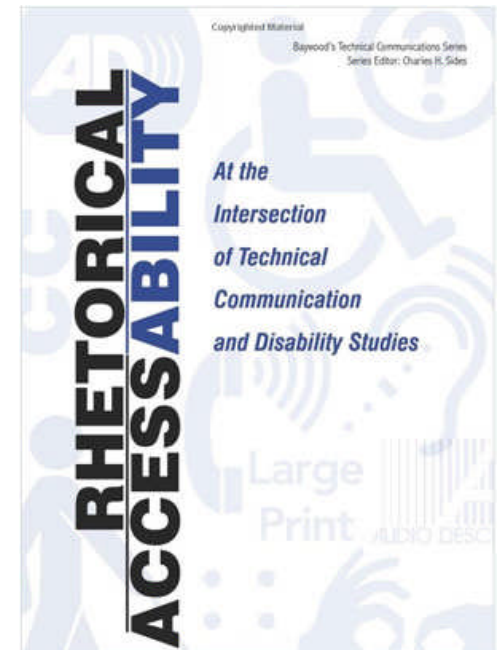
Four people with inspiring ideas about forms



Kathryn Summers, low literacy expert



- Follow her @SummersKathryn
- Co-author, “Design to Read” in “Rhetorical AccessAbility” (2013) edited by Lisa Meloncon
- Shorter version in User Experience magazine, linked from <http://www.designtoread.com>



What about reading the form?

- Suppose the Candy Apple team has a mix of people:
 - Older and younger
 - High and low levels of education
 - Varying ethnic backgrounds
- Any words or phrases that might cause problems?
- Anything else that makes it challenging to read?



Workshop results



- We chose a section from the instructions for this form that talked about lighting poles and GFI outlets.
- The paragraph had long sentences and was hard to read.
- We discussed the challenges of making sure that we:
 - Use the appropriate specialist terminology when designing forms for experts
 - Avoid inappropriate jargon when designing forms for general audiences
 - Create appropriate sections in the form where different people will fill in different sections.

Tip

Try VocabProfile for a quick check of the words you're using

<http://www.lex tutor.ca/vp/eng/>

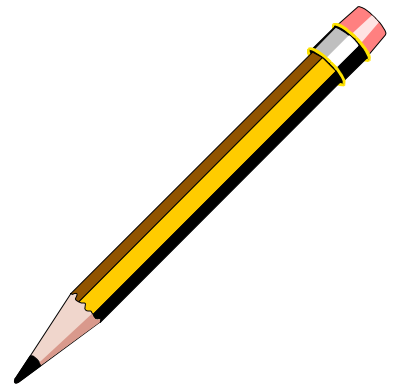
All plans, maps and documentation for the installation of temporary festoon/holiday and other temporary lighting shall be received by the Division of Street Lighting at least 60 days in advance of the desired installation date. Plans (indicating the main street and cross streets where the lights shall be located) are to be detailed and show each pole on the street where the lighting will be installed. The plans shall also indicate from which pole(s) the electric power is to be drawn and which pole is being used solely as an attachment. The plans shall include the size of the cable and the electrical load to be used, where and how the lighting is attached on all ends, such as on another street light pole, on a building, wooden stake, etc.; the types of devices to be installed on the poles and the heights of the equipment over streets and sidewalks. (GFI outlets are required. Please be sure to refer to the Highway Rules.)

Current profile	
%	Cumul.
78.66	78.66
3.66	82.32
7.32	89.64
10.37	100.00

all plans **maps** and **documentation** for the **installation** of **temporary festoon holiday** and other **temporary** lighting shall be received by the division of street lighting at least number days in advance of the desired **installation** date plans **indicating** the main street and cross streets where the lights shall be **located** are to be detailed and show each **pole** on the street where the lighting will be **installed** the plans shall also **indicate** from which **pole** the **electric** power is to be drawn and which **pole** is being used **solely** as an **attachment** the plans shall include the size of the **cable** and the **electrical load** to be used where and how the lighting is **attached** on all ends such as on another street light **pole** on a building wooden **stake** etc the types of **devices** to be **installed** on the **poles** and the **heights** of the **equipment** over streets and **sidewalks** **gfi outlets** are **required** please be sure to **refer** to the highway rules

Where does the answer come from?

- Have a look at the questions on the form.
- Which person on the Candy Apple team will find the answer?



Tip

Provide a list of stuff to assemble
and deal with

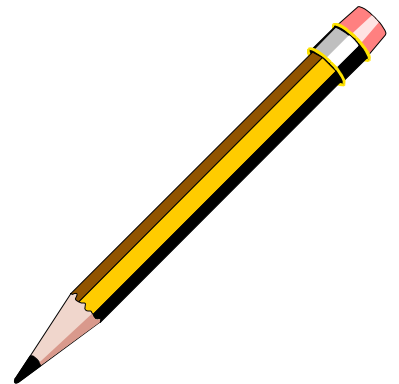


Sometimes more than one person
has to fill in the form.



How many people for our form?

- Let's have another look at those answers.
- How many people do we have to talk to?



An example: UK 'living will'

Before review

LPA PA 1907

Office of the Public Guardian
Lasting Power of Attorney
Property and Affairs

For official use only
Date of registration

Introduction

This is a Lasting Power of Attorney (LPA). It allows a person (the donor) to choose someone (the attorney(s)) to make decisions on their behalf. The attorney(s) can only use the LPA after it has been registered with the Office of the Public Guardian (OPG).

Getting started

Before you complete any part of this LPA you **must** read the prescribed information on the next three pages so that you understand the purpose and legal consequences of making an LPA. You should also read the separate notes on how to complete this LPA which are available from the OPG.

There is information for the donor, attorney(s) and the certificate provider(s) available from the OPG. If you have any questions about how to complete this LPA please contact the OPG.

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Archway Tower
London N19 5SZ
Telephone 0845 330 2963

STAMP

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After review

LPA PA 1907

Lasting Power of Attorney
Property and Affairs

For official use only
Date of registration

This is a Lasting Power of Attorney (LPA). It allows you (the donor) to choose someone (the attorney) to make decisions on your behalf. Your attorney(s) can only use the completed LPA after it has been registered with the Office of the Public Guardian (OPG).

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Things you will need to do to complete this LPA

- decide who to appoint as your attorney(s) in the LPA
- decide if you want to appoint a replacement attorney in case your attorney(s) cannot act for you
- decide whether you want anyone to be notified when an application is made to register your LPA and, if you do, who you want to be notified
- choose at least one independent person to provide a certificate at Part B of the LPA
- fill in part A of the LPA. Your certificate provider(s) will need to complete Part B. Your attorney(s) will need to complete Part C
- have a witness to your signature at the end of Part A of the LPA

What to do after completing this LPA

An LPA can only be used after it has been registered with the OPG, so you will need to think about when you want it to be registered. There is a fee to register an LPA. Further information about how to register an LPA and what happens following registration is available from the OPG.

Information for you, your attorney(s) and your certificate provider(s) is available from the OPG. If you have any questions about how to complete this LPA please contact the OPG.

Office of the Public Guardian
Archway Tower
London N19 5SZ
0845 330 2900
www.publicguardian.gov.uk

OPG
STAMP

Important - This form **cannot** be used until it has been registered by the Office of the Public Guardian and stamped on **every** page.

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Office of the Public Guardian Lasting Power of Attorney Property and Affairs

Before:
Introduction
mentions 2+
other people

Introduction

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There is information for the donor, attorney(s) and the certificate provider(s) available from the OPG. If you have any questions about how to complete this LPA please contact the OPG.

This is a Lasting Power of Attorney (LPA). It allows you (the donor) to choose someone (the attorney) to make decisions on your behalf where you lack capacity to make them for yourself. Your attorney(s) can only use the completed LPA after it has been registered with the Office of the Public Guardian (OPG).

Getting started

Before you complete this LPA you **must** read the prescribed information so that you understand the purpose and legal consequences of the LPA. There are also separate notes on how to complete this LPA when you are disabled. You must read these before you complete it.

Things you will need to do to complete this LPA

- decide **who to appoint as your attorney(s)** in the LPA
- decide if you want to appoint **a replacement attorney** in case your attorney(s) cannot act for you
- decide whether you want **anyone to be notified** when an application is made to register your LPA and, if you do, who you want to be notified
- choose **at least one independent person to provide a certificate** at Part B of the LPA
- fill in part A of the LPA. Your certificate provider(s) will need to complete Part B. Your attorney(s) will need to complete Part C
- have **a witness to your signature** at the end of Part A of the LPA

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After:
Introduction
mentions 5+
other people

Tip

Provide a list of actors
and their roles

The Persons.

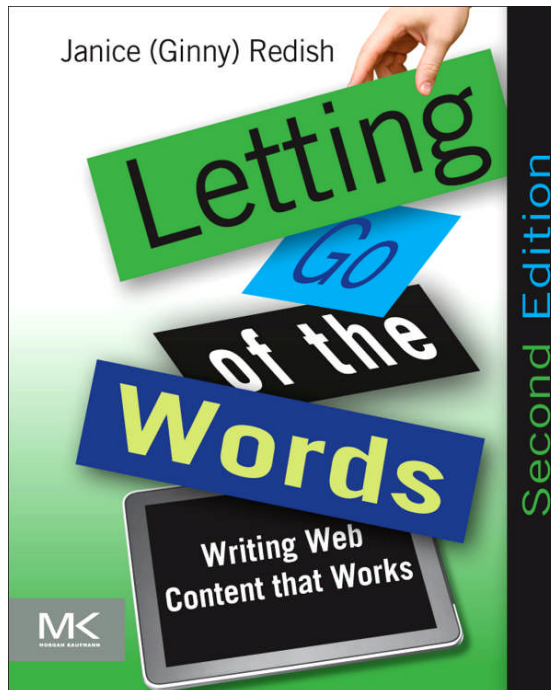
M ^{R.} <i>Horner,</i>	<i>Mr. Hart:</i>
<i>Mr. Harcourt,</i>	<i>Mr. Kenaston.</i>
<i>Mr. Dorilant,</i>	<i>Mr. Lydal.</i>
<i>Mr. Pinchwife,</i>	<i>Mr. Mobun.</i>
<i>Mr. Sparkish,</i>	<i>Mr. Haynes.</i>
<i>Sir Jaspas Fidget,</i>	<i>Mr. Cartwright.</i>
<i>Mrs. Margery Pinchwife,</i>	<i>Mrs. Bowtel.</i>
<i>Mrs. Alithea,</i>	<i>Mrs. James.</i>
<i>My Lady Fidget,</i>	<i>Mrs. Knep.</i>
<i>Mrs. Dainty Fidget,</i>	<i>Mrs. Corbet.</i>
<i>Mrs. Squeamish.</i>	<i>Mrs. Wyatt.</i>
<i>Old Lady Squeamish.</i>	<i>Mrs. Rutter.</i>

Four people with inspiring ideas about forms



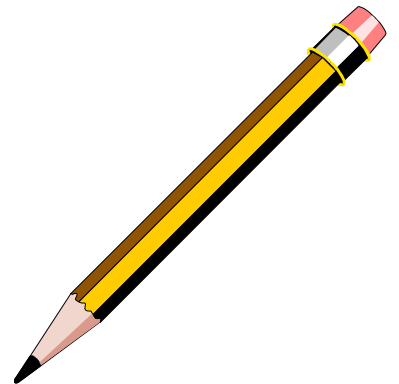
Ginny Redish, writing and usability expert

- Follow her @GinnyRedish
- Even if you already have the first edition of “Letting go of the words”, buy the 2nd edition

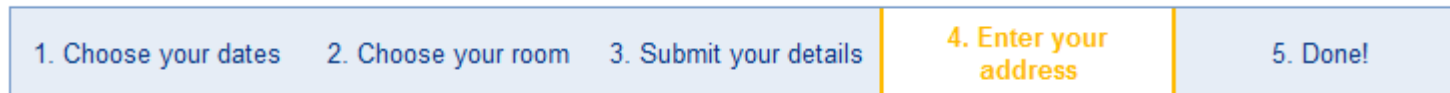


What steps do we need in the new form?

- How are we going to organise the flow for the form?
- What are the steps in the process?



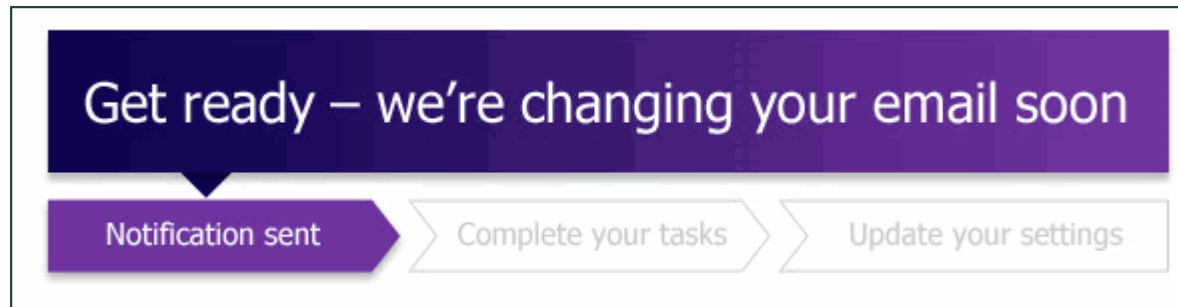
Simple forms may progress



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Complex forms often don't.



Easy but worrying



Horrendous



Even worse

A summary menu updates as you finish the chunks of the form in any order

Registration Tools	
Instructions	View TPP
Show Errors	Delete Profile
CCR Help	Renew Profile
Handbook	Quit CCR

Registration Menu	
Required Information	Status
General Information	✓
Corporate Info	✓
Goods / Services	✓
Financial	✓
Points of Contact	!
Optional Information	Status
EDI	NR
DUNS +4	NR
D&B Monitoring	NR

Registration Status
Incomplete Registration

Corporate Information

! Missing or Invalid Data * Required Data V View-Only Data (Edits not allowed)

* Type of Relationship with U.S Federal Government (Required information, check one)

- ☒ Contracts
- ☐ Grants
- ☐ Both (Contracts & Grants)

* Type of Organization (As defined by the IRS) (Required information, check one)

- ☒ Corporate Entity, Not Tax Exempt
- ☐ Corporate Entity, Tax Exempt
- ☐ Partnership
- ☐ Sole Proprietorship
- ☐ U.S. Government Entity (If selected, then choose one subgroup below)
 - ☐ Federal Government (If selected, choose all subgroups that apply.)
 - ☐ Federal Agency
 - ☐ Federally Funded Research and Development Corporation
 - ☐ State Government
 - ☐ Local Government (If selected, choose all subgroups that apply.)
 - ☐ City
 - ☐ County
 - ☐ Inter-municipal
 - ☐ Local Government Owned
 - ☐ Municipality
 - ☐ School District

Tip

Use summary menus rather than progress indicators



Image credit: shutterstock.com

Agenda

‘Complex’ and ‘simple’ in forms

Users and usage of complex forms

Conversation and flow in complex forms

Appearance of complex forms

Four people with inspiring ideas about forms



Jessica Enders, forms and survey expert

- Follow her @Formulate
- Find her articles at: <http://formulate.com.au/>



Remember the craze for “MadLibs” forms? Jessica did one that works.

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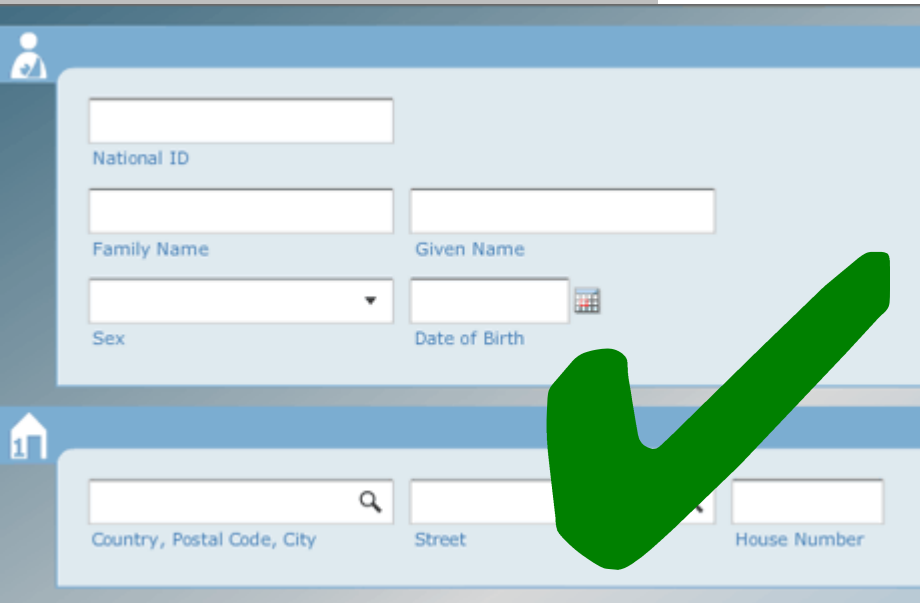
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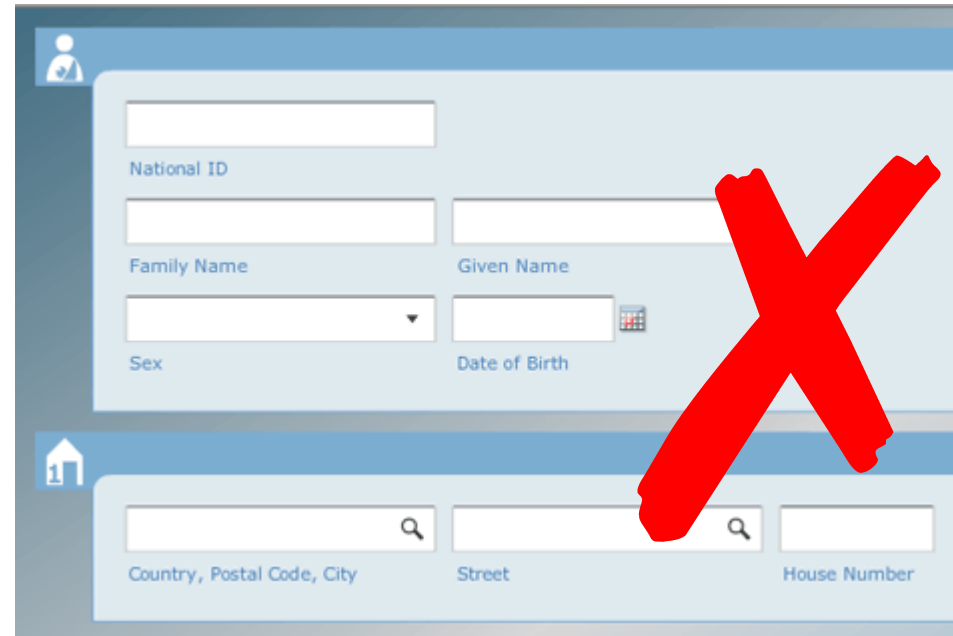
Tip

Make sure that each label is:

- near to its own field
- far from any other field



A screenshot of a user registration form with correct label placement. The form is divided into two sections. The top section contains fields for National ID, Family Name, Given Name, Sex, and Date of Birth. The bottom section contains fields for Country, Postal Code, City, Street, and House Number. A large green checkmark is overlaid on the form, indicating that the label placement is correct.



A screenshot of a user registration form with incorrect label placement. The form is divided into two sections. The top section contains fields for National ID, Family Name, Given Name, Sex, and Date of Birth. The bottom section contains fields for Country, Postal Code, City, Street, and House Number. A large red X is overlaid on the form, indicating that the label placement is incorrect.

More about label placement on these forms:
<http://bit.ly/cXPcuV>

One example of best practice in this form: unsplit names

Contact name in Group:	_____	Telephone:	_____
Mayor's Office Street Activity Permit (if appropriate) #:	_____ (Please attach copy of permit.)		
Electrical Contractor Performing Work:	_____	License # of Contractor:	_____
Contractor <u>24 Hour</u> Contact Name:	_____	Telephone:	_____

<http://formulate.com.au/articles/the-name-riddle/>

Tip

Try to avoid splitting names, especially for mixed ethnicities



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Summary

We've looked at tips about relationship

- Try a 'replay study'
- Track a sample of forms through your process
- Use a question protocol to establish who uses the data

Relationship

Goals achieved

And tips about conversation

- Try VocabProfile for a quick check of the words you're using
- Provide a list of stuff to assemble and deal with
- Provide a list of actors and their roles
- Provide summary menus rather than progress indicators

Conversation

Easy to understand
and answer

And tips about appearance

- Ensure each label is:
 - near to its own field, and
 - far from any other field
- Try to avoid splitting names, especially for mixed ethnicities

Appearance

Lovely and legible

A great form works well across all three layers

Appearance

Lovely and legible

Conversation

Easy to understand
and answer

Relationship

Goals achieved



More tips <http://www.slideshare.net/cjforms>

Design tips for surveys 2012

Caroline Jarrett

User Interface Engineering / Rosenfeld Media Seminar



Design tips for complex forms Malta 2012

Caroline Jarrett



Design tips for complex forms 2011

Caroline Jarrett

J.Boye Conference Denmark



Design tips for complex forms

Caroline Jarrett

Clarity 2010 Lisbon

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