Design of survey forms

Workshop at the General Online Research Conference
Cologne, German, March 2014

#GOR14, Cologne

Caroline Jarrett @cjforms

Agenda

Introductions

The three layers of the form

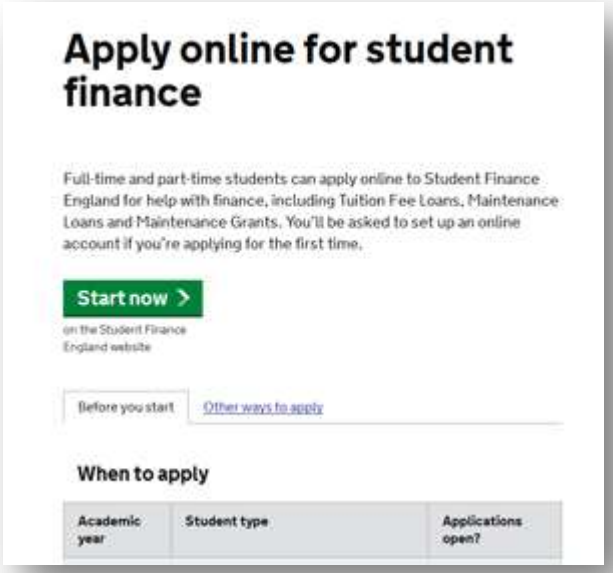
Relationship

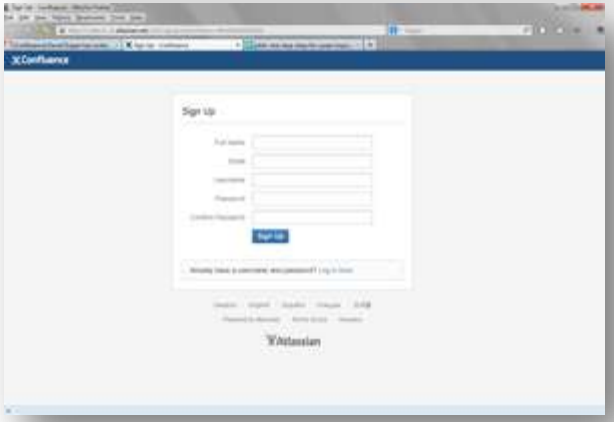
Conversation

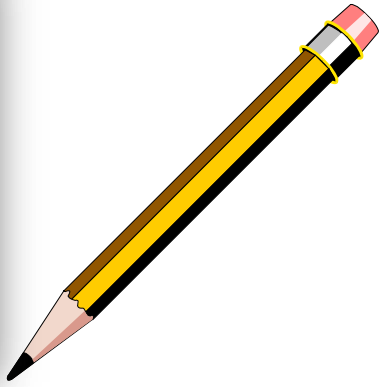
Appearance

On Her Majesty's Service

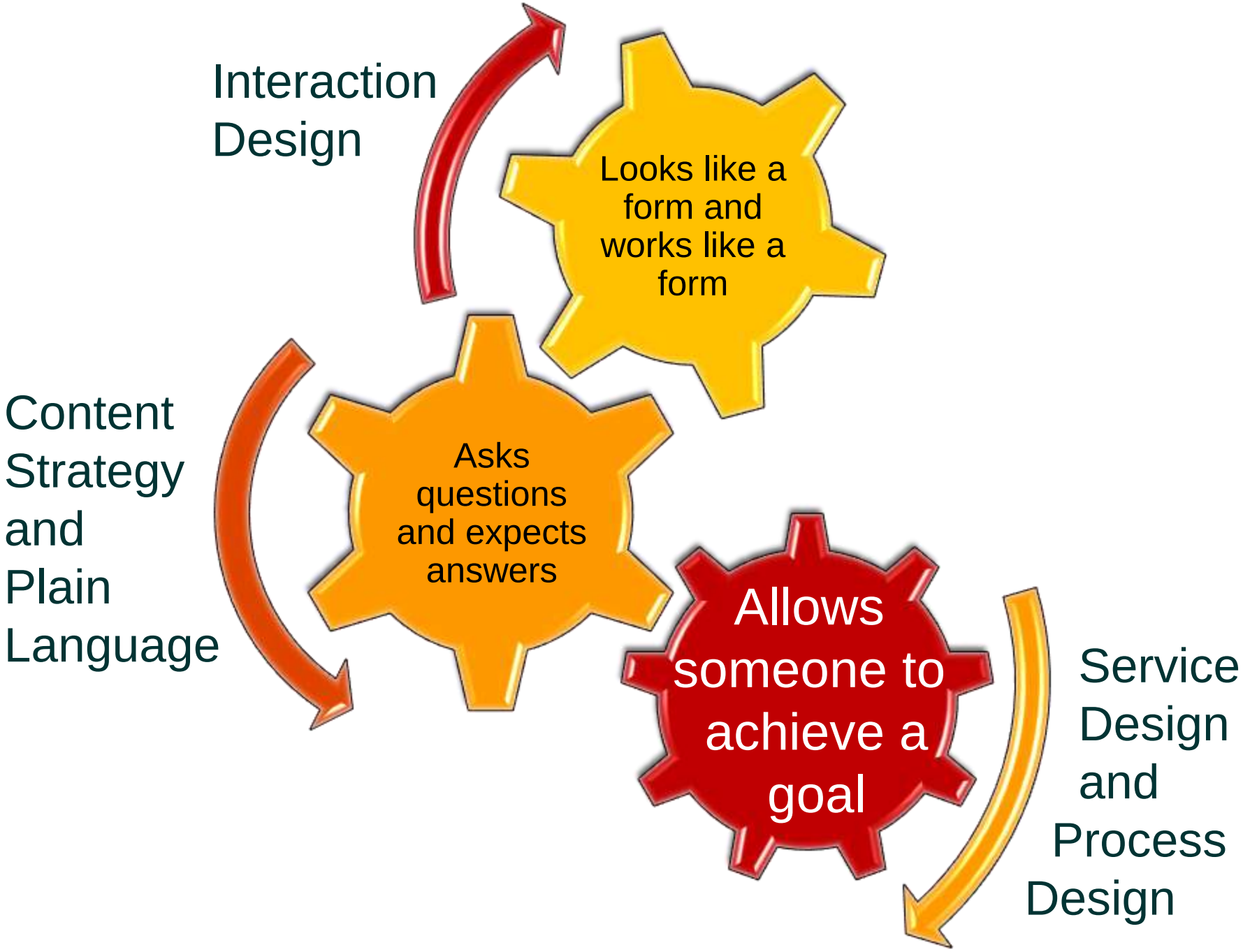
At a glance, which ones are forms?

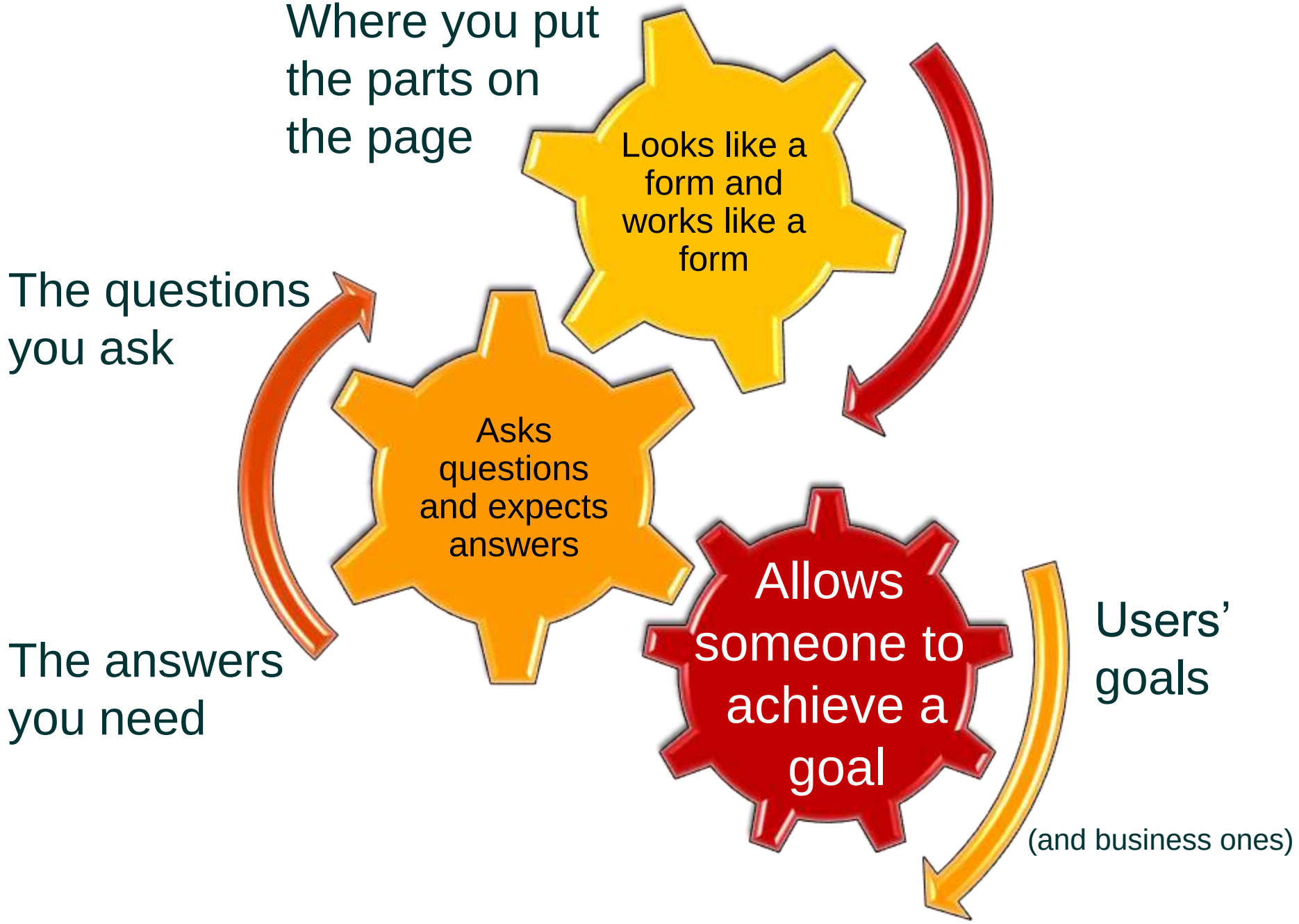






It's a form if it …


Interaction Design
Looks like a form and works like a form
Content Strategy and Plain Language
Asks questions and expects answers
Allows someone to achieve a goal
Service Design and Process Design


Where you put the parts on the page
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)

A great form works well across all three layers

Appearance

Conversation

Relationship

Schema from “Forms that work: Designing web forms for usability”, Jarrett and Gaffney (2008) www.formsthatwork.com

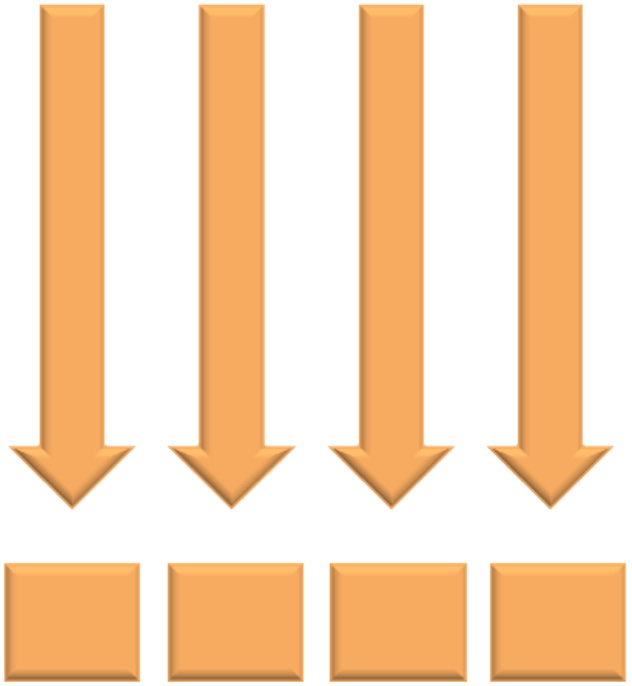
Which ones are surveys?

Is there anything wrong with this page?

Forms and questionnaires differ in how the answers are used

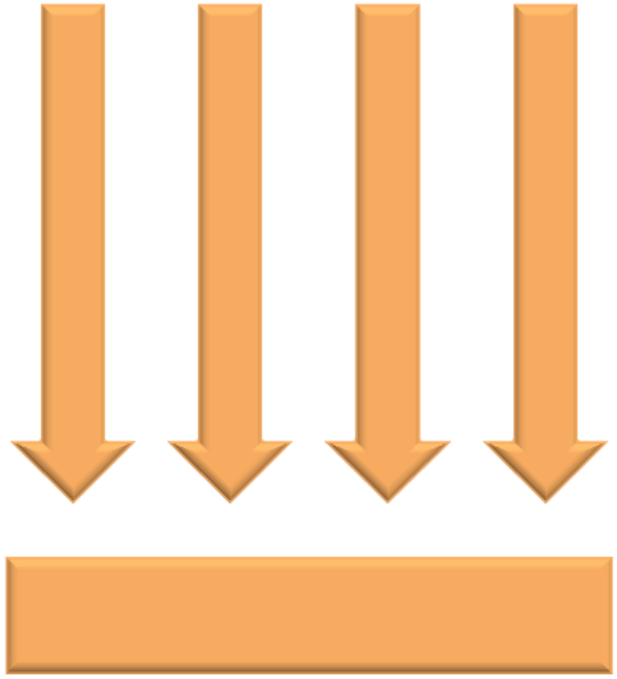
Form:

answers used individually



Questionnaire:

answers aggregated



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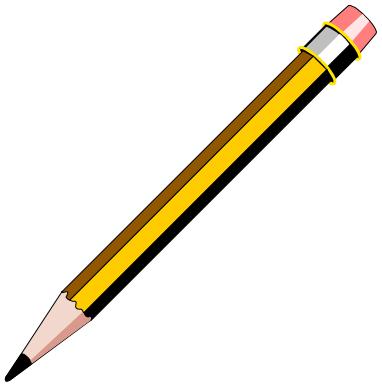
Understand the relationship

- Who will use this form?
- Why will they use it?
- When and where?
- How will they use it?
- What will they achieve by using it?

Picture credits: Flickr @chelmsfordpubliclibrary

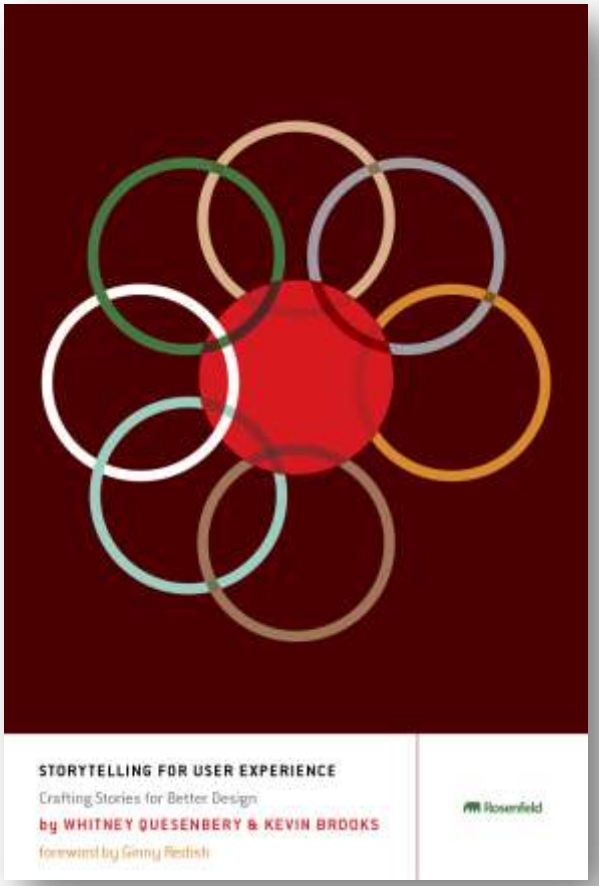
Write a story

- Who will use this form?
  - Choose a photograph of someone who will use the form (“persona”)
  - Choose a name for the persona
  - Write three sentences about who the persona is
- Write the story your persona and the form:
  - Why the persona is using the form
  - When and where the persona will use the form
  - How the persona will use the form
  - What the persona will achieve by using the form



Tip

Create a story to help you decide what you need to find out about the people who use your form and their goals



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Passengerfocus

National Rail Passenger Survey Spring 2014

How satisfied are you?

Please use the links below to enter the latest wave of the survey.

You will need to enter the 11 digit code that appears on the top left of the questionnaire handed to you at the station to access the survey.

- ENTER SURVEY HERE
- ENTER LARGE PRINT VERSION HERE

Any Questions?

If you have any questions regarding the National Passenger Survey please contact Rebecca Joyner on **020 7490 9148**.

Accessibility | Sitemap | Terms & Conditions | Privacy Policy | Contact Us | Login

Who are you?

Passengerfocus

Passenger Focus carries out regular large scale surveys of rail passengers' journeys. Passenger Focus is the official, independent rail consumer watchdog. The rail industry and government pay close attention to the survey results and use them to prioritise improvements. The Department for Transport and Office of Rail Regulation, among others, use the results to assess the performance of the rail industry. To find out more or see how previous surveys led to change see http://www.passengerfocus.org.uk.

To start please enter the 11 digit serial number which appears on the top left hand corner of the paper questionnaire you were given at the station.

Serial number :

Next

Too late!

Passengerfocus

National Rail Passenger Survey Spring 2014

How satisfied are you?

Please use the links below to enter the latest wave of the survey.

You will need to enter the 11 digit code that appears on the top left of the questionnaire handed to you at the station to access the survey.

- ENTER SURVEY HERE
- ENTER LARGE PRINT VERSION HERE

Any Questions?

If you have any questions regarding the National Passenger S… lea… …148.

Where's the box for me to type into?

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To start please enter the 11 digit serial number which appears on the top left hand corner of the paper questionnaire you were given at the station.

Serial number :

Next

OK, there it is

Think about where we are in the conversation (suggested version, page 1)

Passengerfocus

National Rail Passenger Survey Spring 2014

How satisfied are you with your recent rail journey?

To do this survey, you'll need the paper questionnaire we handed to you at a railway station.

- ENTER SURVEY HERE
- ENTER LARGE PRINT VERSION HERE

Any Questions?

If you have any questions regarding the National Passenger Survey please contact Rebecca Joyner on **020 7490 9148**.

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The rail industry and government pay close attention to our survey results and use them to prioritise improvements.

Find out how previous surveys led to change.

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Think about where we are in the conversation (suggested version, page 2)

Passengerfocus

Please start by copying the serial number from the top left-hand corner of the paper questionnaire.

Serial number :

Next

Tip

Think about the questions that respondents have for you

Who are you?

Why do I have to do this?

Why do you need this answer?

Where can I find this answer?

Why are you asking this question?

How do I contact you?

How much more do I have to do?

Can I take a break?

Image credit: Shutterstock

Which parts of this form answer the respondent's questions?

XING EVENTS TRY NOW

IDA

Pay for your membership

MIN SEC
18:53

Please complete your order within the given amount of time.
After this time, your tickets are no longer reserved for you and are available for others.

1 TICKETS | 2 BUYER AND TICKET DATA | 3 PAYMENT DATA | 4 CHECK AND ORDER

Ticket data #1 [Corporate]

* = mandatory

First name

Last name

Email

The IDA Hardship Fund

0.00 £

You can add a voluntary donation to The IDA Hardship Fund. This supports people who might otherwise be unable to attend our events.

Back Next step »

Your data is being transmitted via **SSL encryption**, stored securely on our systems and handled confidentially. View SSL certificate

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Tip

You don’t need a progress bar on a simple form

Discussion: navigation on complex forms

- Navigation type 1: the left-hand menu
  - Always available
  - Sometimes grows depending on your answers
- Navigation type 2: the summary page
  - A separate page which shows sections
  - May have a ‘build my form’ process before it starts
- Which do we prefer? Why?

“Walls of words” are challenging to read

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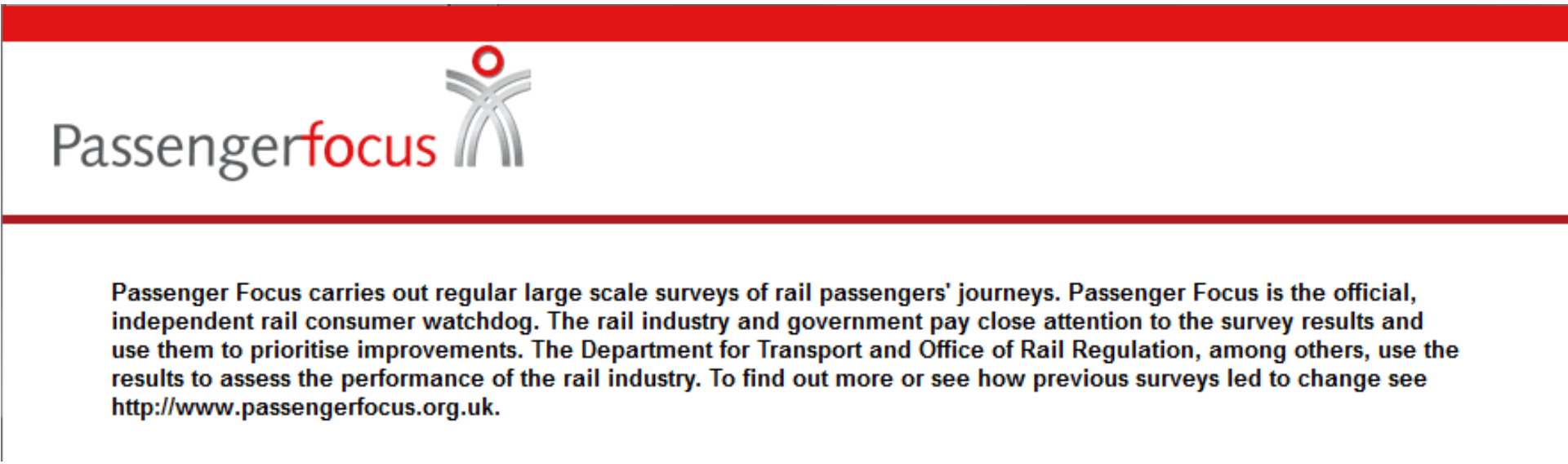
My suggested version is shorter and clearer



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We do regular large scale surveys of rail passengers' journeys.

The rail industry and government pay close attention to our survey results and use them to prioritise improvements.

Find out how previous surveys led to change.

A suggestion: walls of words

- We can get ‘walls of words’ inside complex questions
- Review this ‘before’ and ‘after’ suggestion
- Your views?

Tip

Demolish walls of words

For ideas how to do it, try:
http://www.editingthatworks.com/step6.htm

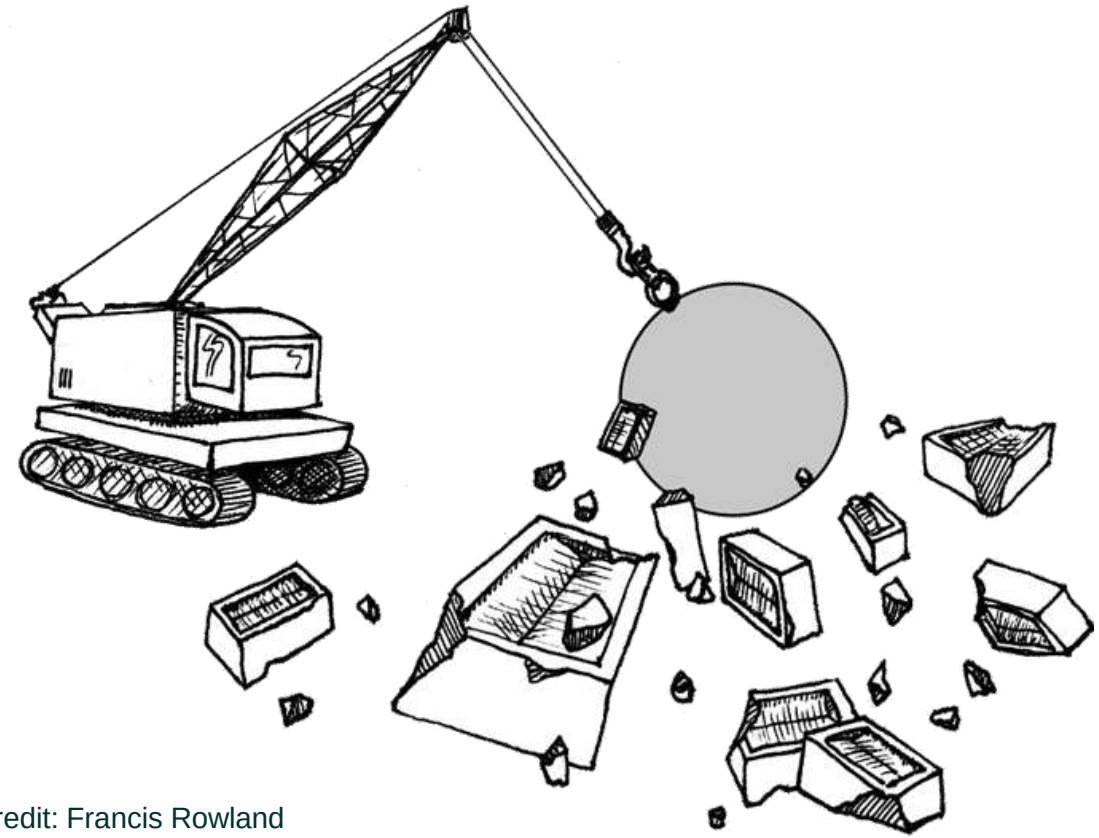

Image credit: Francis Rowland

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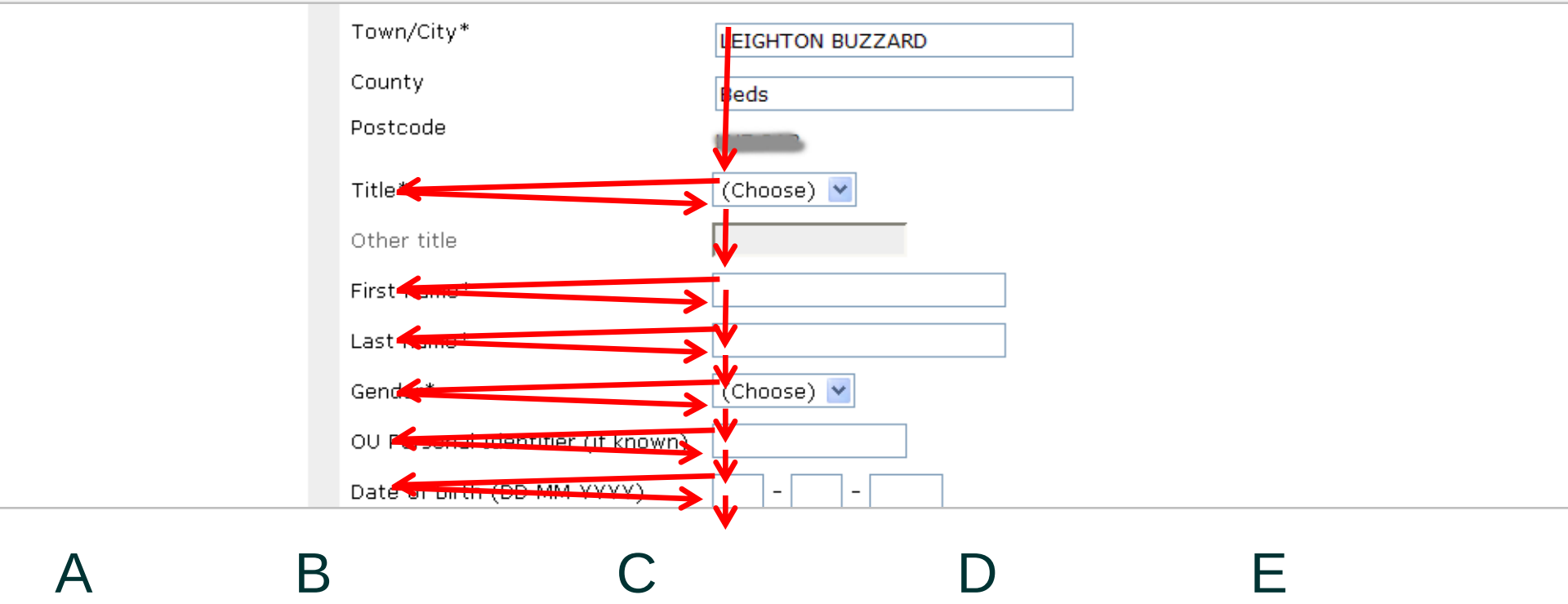
I reviewed some button research at IDC2012

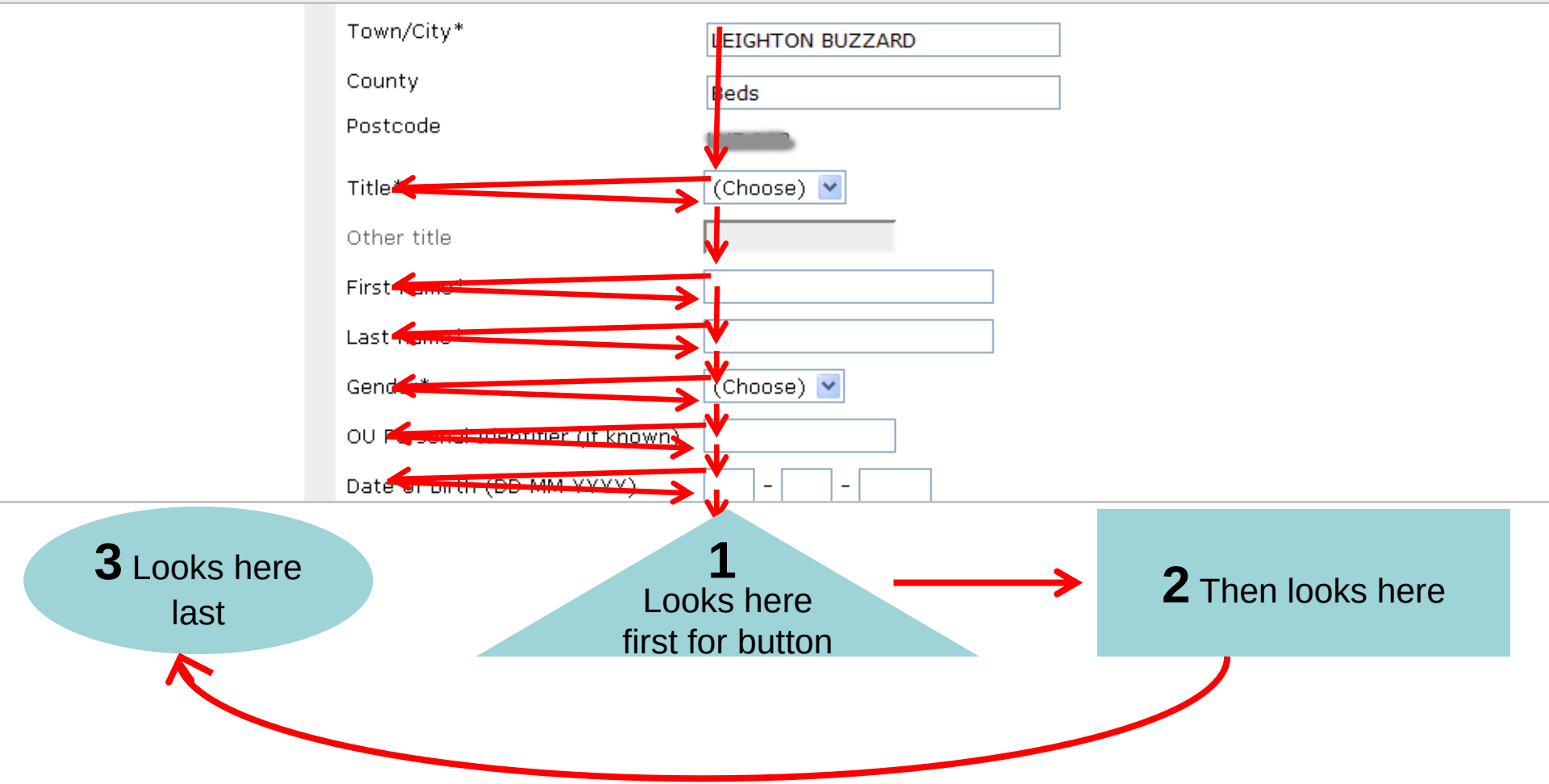
http://www.slideshare.net/cjforms/buttons-on-forms-and-surveys-a-look-at-some-research-2012

The basic eye movement on forms: look for a box, turn left to read the label



Where to put the button?

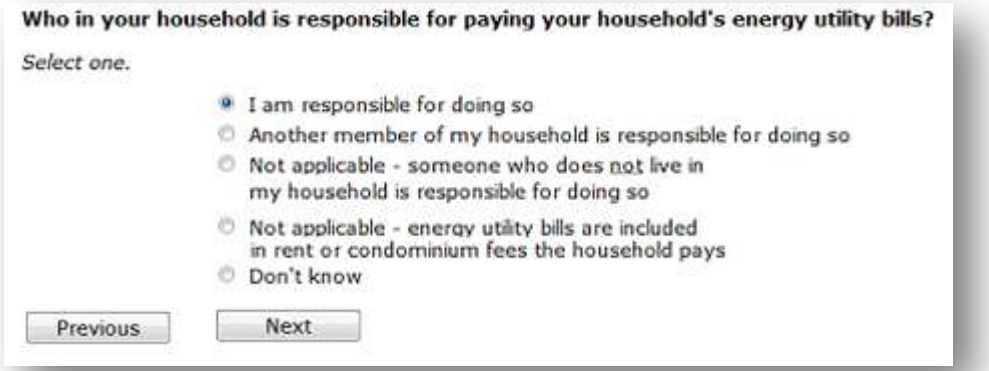
Best place for a button: aligned with left-hand end of text boxes



Tip

Put the buttons in the right place relative to the questions

Then work out where the buttons go compared to each other

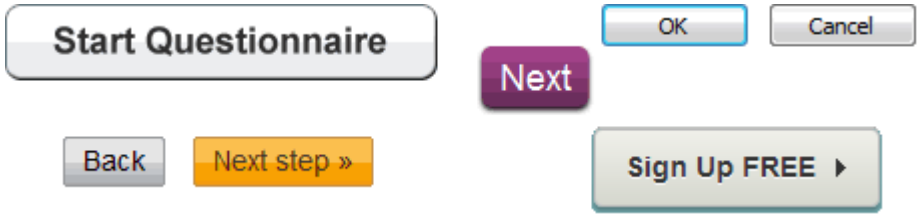


http://www.uxmatters.com/mt/archives/2012/05/7-basic-best-practices-for-buttons.php

Tip

Basic best practices for buttons

1. Make buttons look like buttons.
2. Put buttons where users can find them.
3. Make the most important button look like it's the most important one.
4. Put buttons in a sensible order.
5. Label buttons with what they do.
6. If users don't want to do something, don't have a button for it.
7. Make it harder to find destructive buttons.



http://www.uxmatters.com/mt/archives/2012/05/7-basic-best-practices-for-buttons.php

Which layout appeals more? A

SUBMIT A PASSPORT APPLICATION FOR A MINOR UNDER AGE 16:

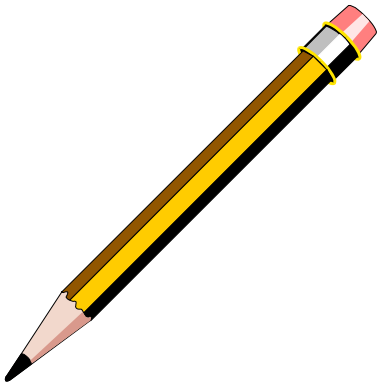
Read and understand **Steps 1 - 9 before** leaving this page.

1. Complete Form DS-11: *Application For A U.S. Passport*
2. Submit Form DS-11: *Application For A U.S. Passport* In Person
3. Submit Child's Evidence of U.S. Citizenship
4. Submit Evidence of Relationship Between Child and Parent(s)/Guardian(s)
5. Present Identification of Parent(s)/Guardian(s)
6. Submit a Photocopy of Each Parent/Guardian ID Document To Be Presented (Step 5)
7. Provide Parental Consent
8. Pay the Applicable Fee
9. Submit One Passport Photo

STEP 1: Complete Form DS-11: *Application For A U.S. Passport*

Complete Form DS-11: *Application for a U.S. Passport* . Please note, you:

- **Must not sign** the application until instructed to do so by the



Which layout appeals more? B

STEP 5: Present Identification of Parent(s)/Guardian(s)

When applying for a minor under age 16, **both** parent(s)/guardian(s) must **present** acceptable identification at the time of application.

Primary Identification (One of the following):

- ☑ Previously issued, undamaged U.S. passport
- ☑ Naturalization Certificate
- ☑ Valid Driver's License
- ☑ Current Government Employee ID (city, state or federal)
- ☑ Current Military ID (military and dependents)

NOTES:

- If none of these items are available, please see Secondary Identification.
- **If you apply at an Acceptance Facility and submit out-of-state primary identification, you must present a second ID**, as well. For example, if you apply in Maryland with a Virginia Driver's License, you must present a second ID containing as much of the following information as possible: your photo, full name, date of birth, and the document issuance date.

Which layout appeals more? C

4 What to Submit With Your Application(s)

One Recent Passport Photo

Click here to view details on submitting a passport photo

Correct Passport Fees

Your total passport fees are:$105.00

See the Passport Fees for more information.

Proof of U.S. Citizenship

Birth Certificate, Certificate of Naturalization, Consular Report of Birth Abroad, Citizenship Certificate or a previous U.S. passport. See Section 2 of How to Apply in Person for a Passport.

Proof of Relationship

Birth Certificate with BOTH parents' names, Adoption decree with BOTH adopting parents' names, etc. Parent(s)/Guardian(s) must provide a photo ID at the time of application. For more information see Section 3 of Special Requirements for Children Under Age 16.

Which layout appeals more? A

Who should we contact in case of an emergency?

First & Last Name:

Street Address / RFD# Or P.O. Box:

Apt/Suite#:

City:

State: Please Select...

Zip Code:

Telephone Number (no dashes):

Relationship:

<< Previous Next >>

Which layout appeals more? B

Passport Acceptance Facility Search Page

This site will allow you to find the nearest location to apply for a passport. It is provided by the Department of State's Bureau of Consular Affairs, Office of Passport Services/Customer Service, which designates many post offices, clerks of court, public libraries and other state, county, township, and municipal government offices to accept passport applications on its behalf. This page allows you to search by one of three search scopes - Zip Code, State, or State/City. Once you enter your criteria, click on the "Search" button to view a list of the nearest designated passport application facilities.

Search By:

ZIP Code: Closest 10 facilities

All facilities within 10 miles

State:

City:

Additional Search Criteria: Handicap Access Photo On-site Photo Nearby

Search

Please note that information on this site changes weekly. If you wish to provide feedback on using this site, click here.

Which layout appeals more? C

Application for U.S. Passport

Before you may enter your personal information to get a passport, you must review the Department of State's Privacy and Computer Fraud and Abuse Acts Notices and Disclaimers.

This link opens a new page. Once you have read the notice and disclaimer, close that window and click on the box below to indicate you have read them.

☐ I have read the Privacy and Computer Fraud and Abuse Acts Notices and Disclaimers.

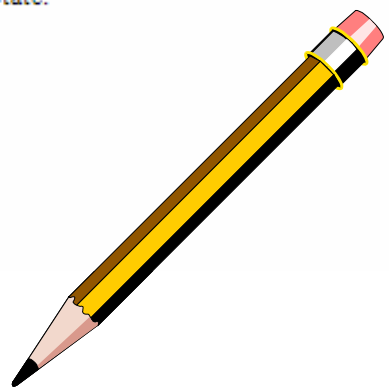
Submit Cancel

To report technical problems with this web site, please email us at passportweb@state.gov

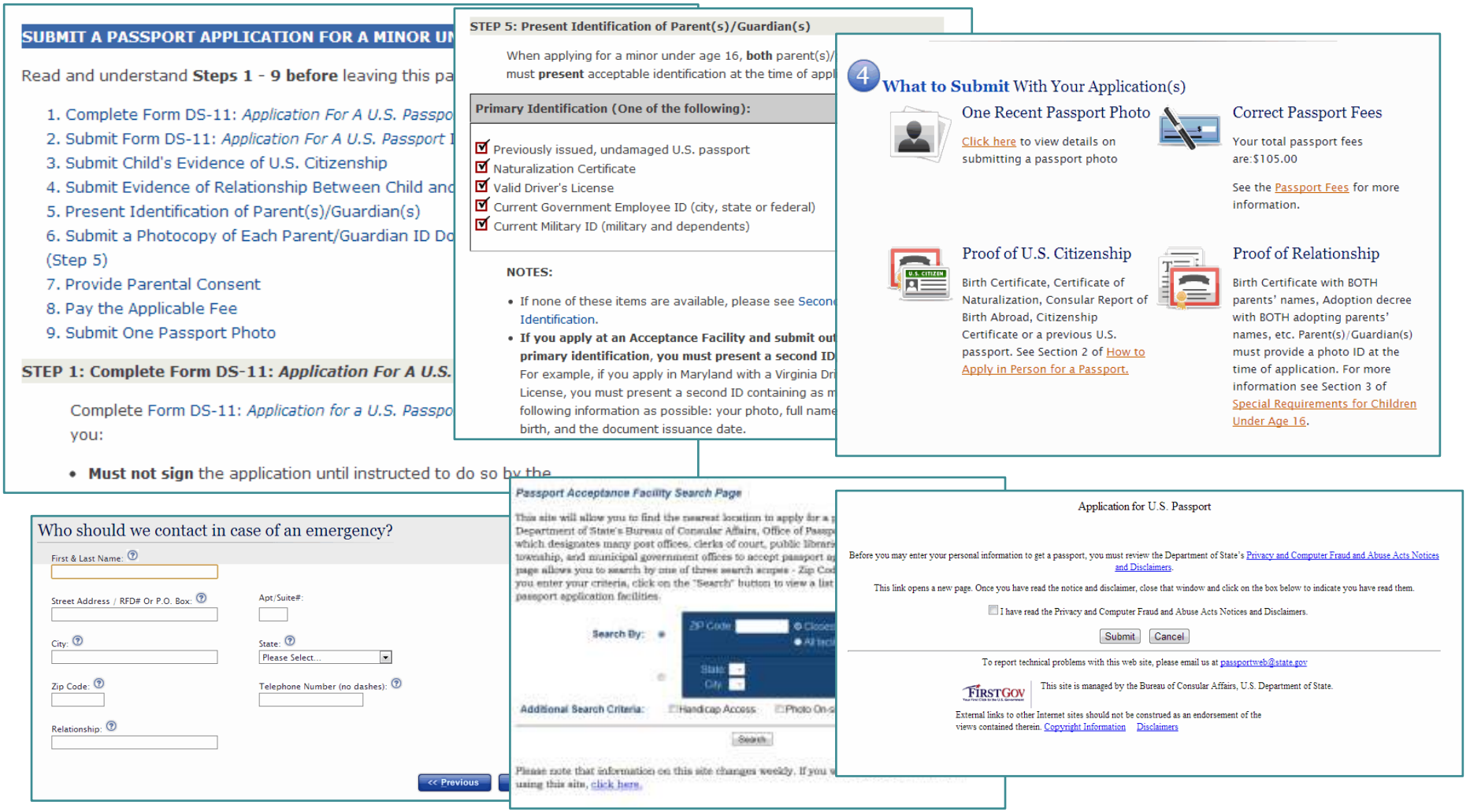
FIRSTGOV Your First Click to the U.S. Government

This site is managed by the Bureau of Consular Affairs, U.S. Department of State.

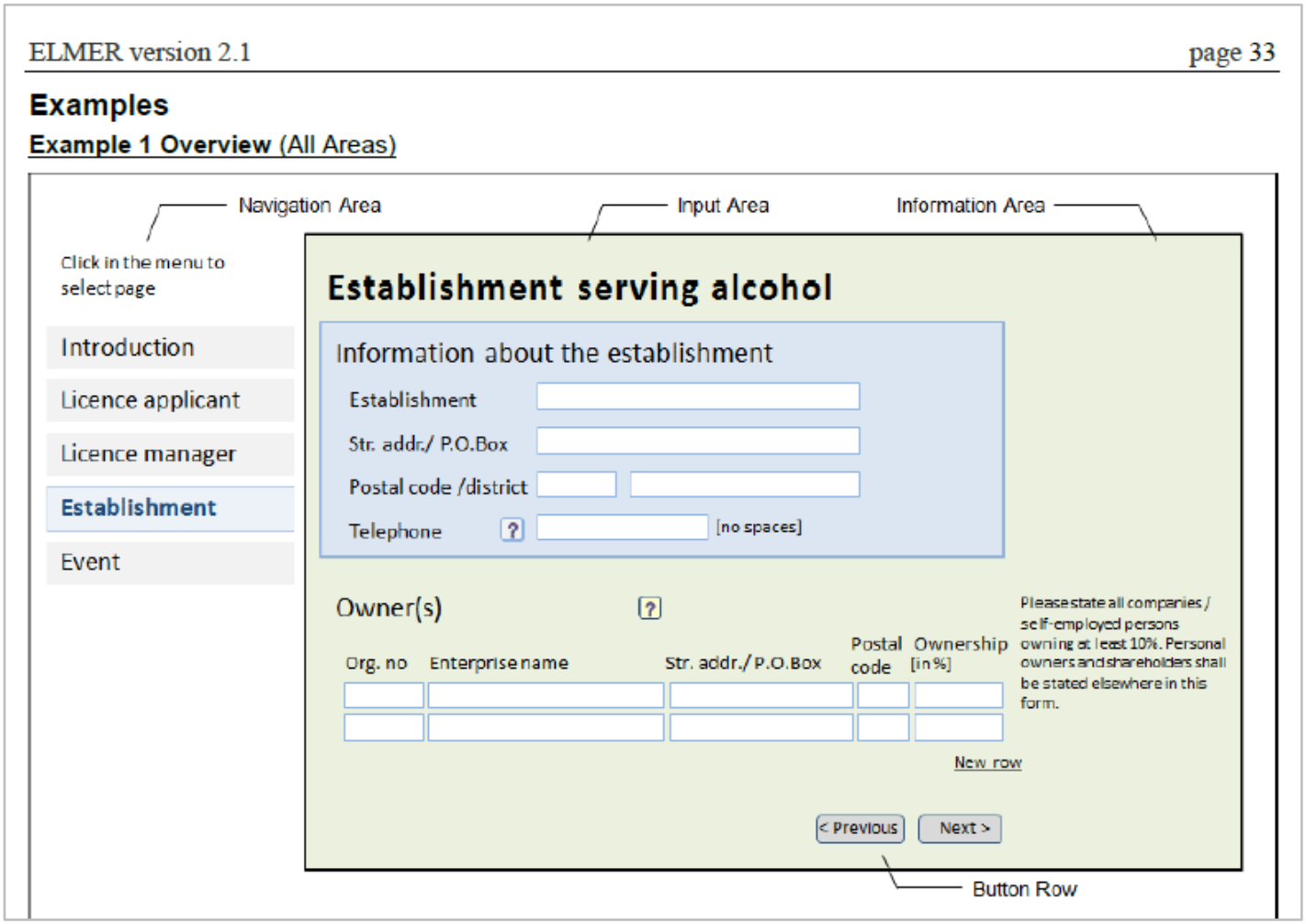
External links to other Internet sites should not be construed as an endorsement of the views contained therein. Copyright Information Disclaimers



All those screenshots were from the US passport application

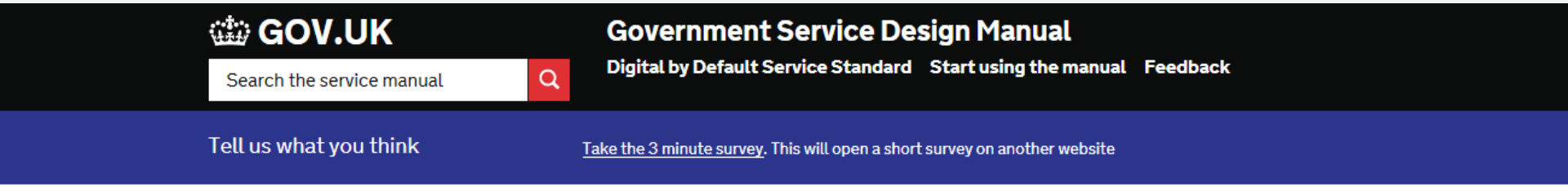


Norway mandates the Elmer guidelines for government forms



http://www.brreg.no/elmer/elmer_2_1_english.pdf

GOV.UK has a service manual



Home > User centered design

Forms

https://www.gov.uk/service-manual/user-centered-design/resources/forms.html

Markup, styles and layout for form elements

ALPHA BETA LIVE

Contents

Writing the HTML for forms
User interface patterns
Aligning controls in a column
Aligning controls in a row
Pre-checked radios and checkboxes
Wrapping controls in a label tag
Label positioning
Hidden labels

Writing the HTML for forms

Like other components of web pages, forms should be created following the principles of progressive enhancement.

Browsers have default styling for forms. This is usually shared with the styling of the operating system user interface (UI), making it familiar to users. Ensure that any styling you add does not remove any of the native, highly accessible functionality offered by these defaults.

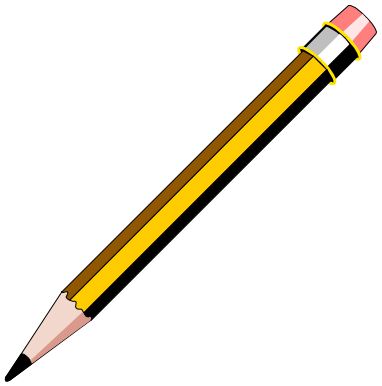
The HTML5 specification should be consulted for guidance on creating the HTML. This is more important than with other HTML elements as some types of user will depend on proper use of the language. For example it is important each form element has a label describing it otherwise

Tip

Create a simple set of rules and apply them everywhere

Discussion: topics for the rules

- What topics do we need to see in our set of rules?
- Do we want:
  - The same topics as in the GOV.UK page?
  - Those topics plus other pages?
  - Different topics?



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Summary

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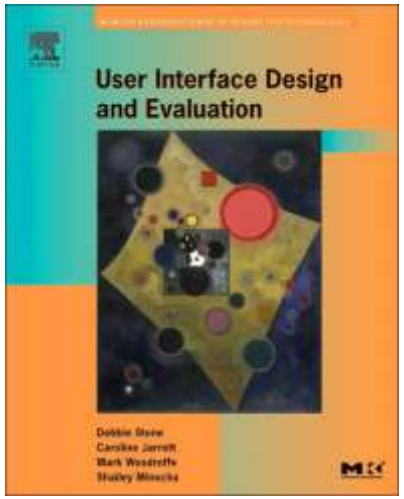
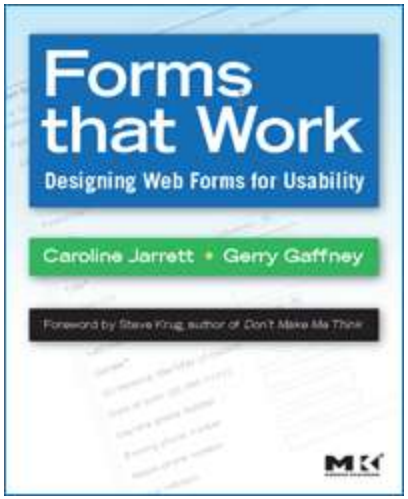
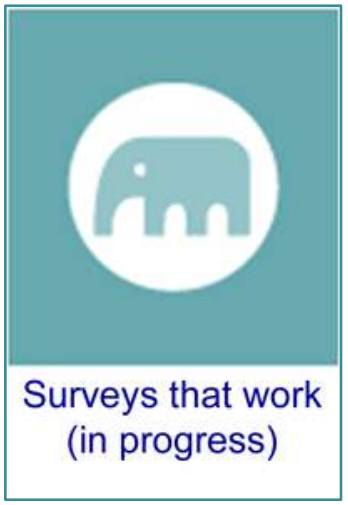
Schema from “Forms that work: Designing web forms for usability”, Jarrett and Gaffney (2008) www.formsthatwork.com

Some resources for forms design

- "Forms that work": http://www.formsthatwork.com
- Columns on Uxmatters.com:
  - Don't Put Hints Inside Text Boxes in Web Forms http://www.uxmatters.com/mt/archives/2010/03/dont-put-hints-inside-text-boxes-in-web-forms.php
  - Don't Put Labels Inside Text Boxes (Unless You're Luke W) http://www.uxmatters.com/mt/archives/2013/02/dont-put-labels-inside-text-boxes-unless-youre-luke-w.php
  - The Question Protocol: How to Make Sure Every Form Field Is Necessary http://www.uxmatters.com/mt/archives/2010/06/the-question-protocol-how-to-make-sure-every-form-field-is-necessary.php

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

Caroline Jarrett

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