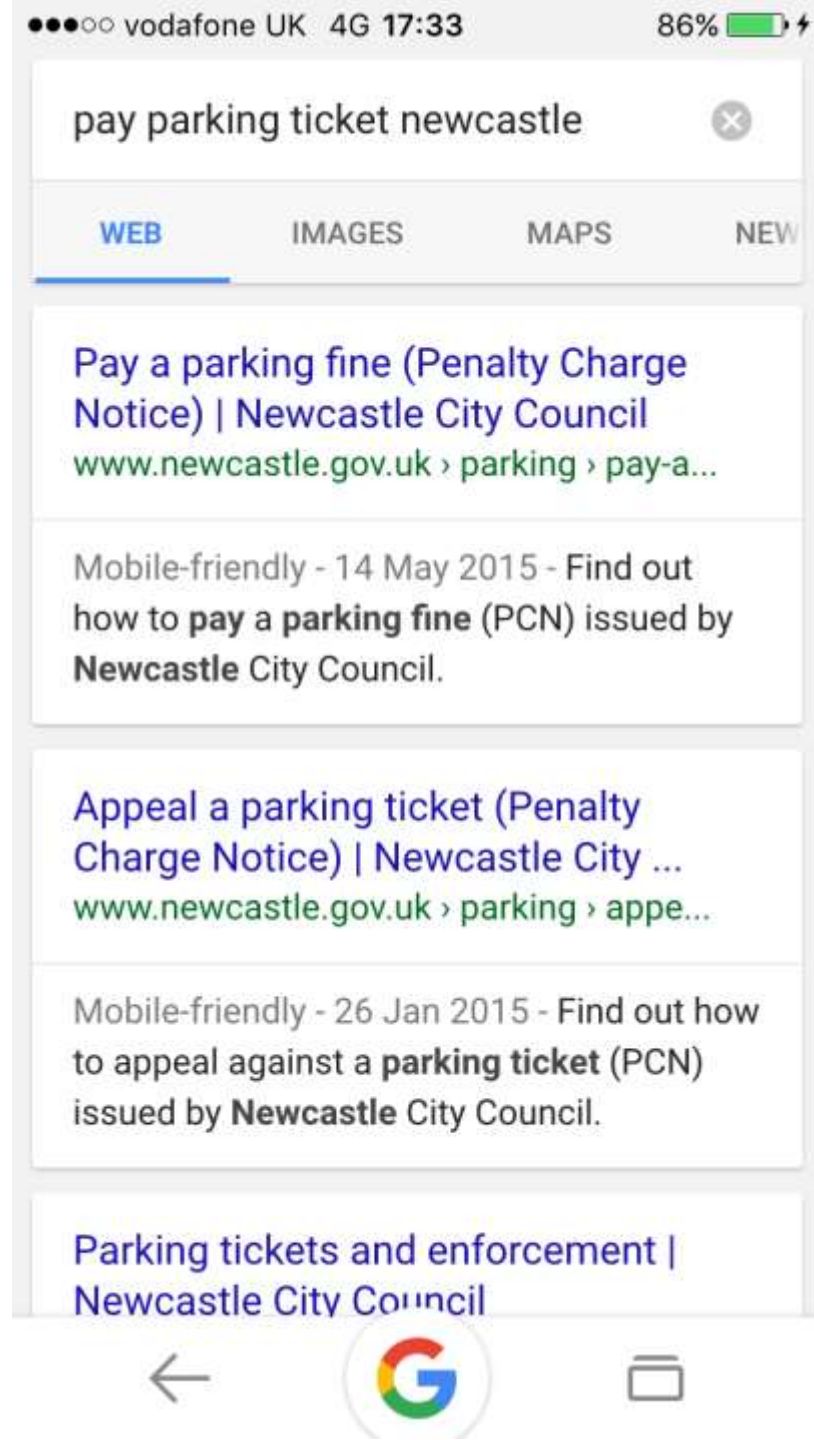# Forms workshop

ConCon Manchester 2016

Caroline Jarrett @cjforms

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
the form start?

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
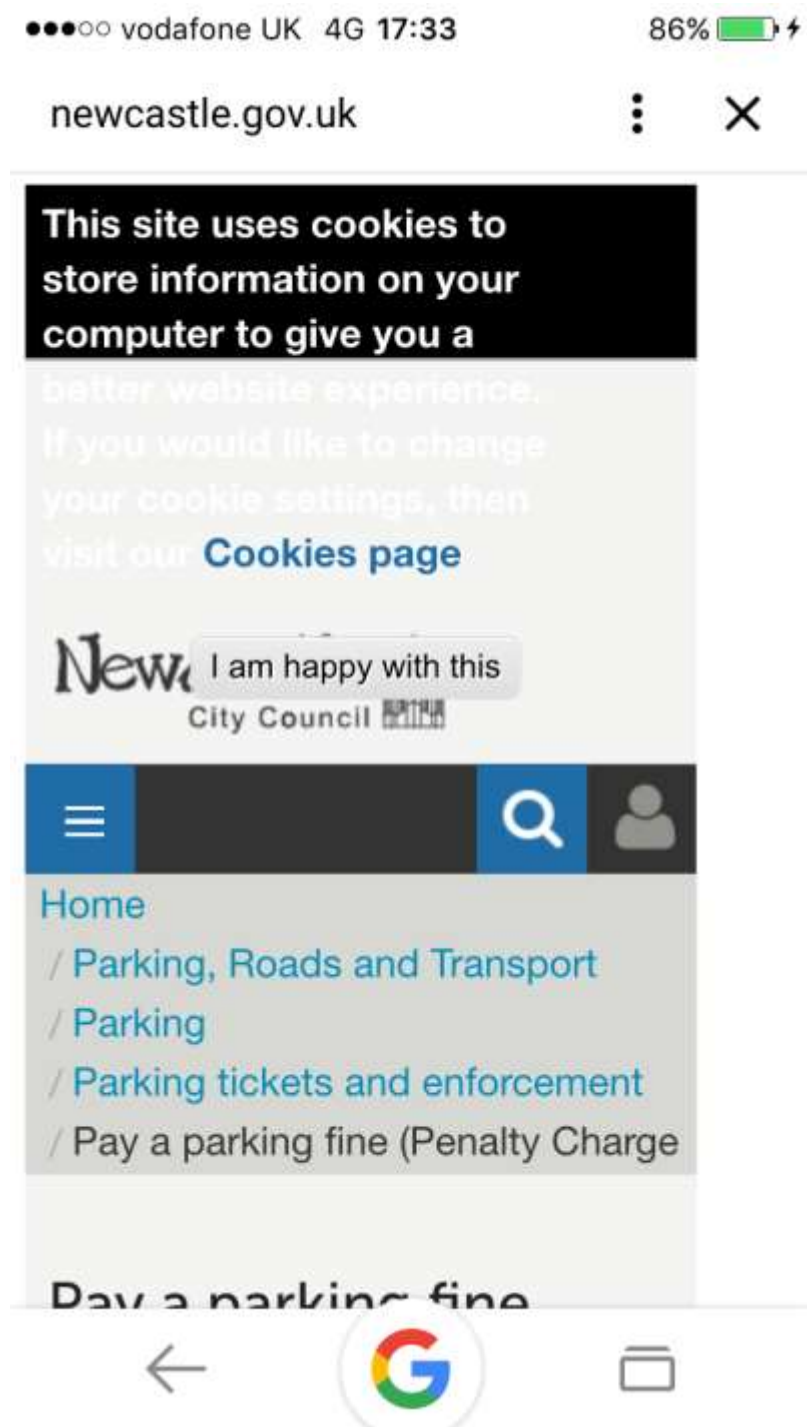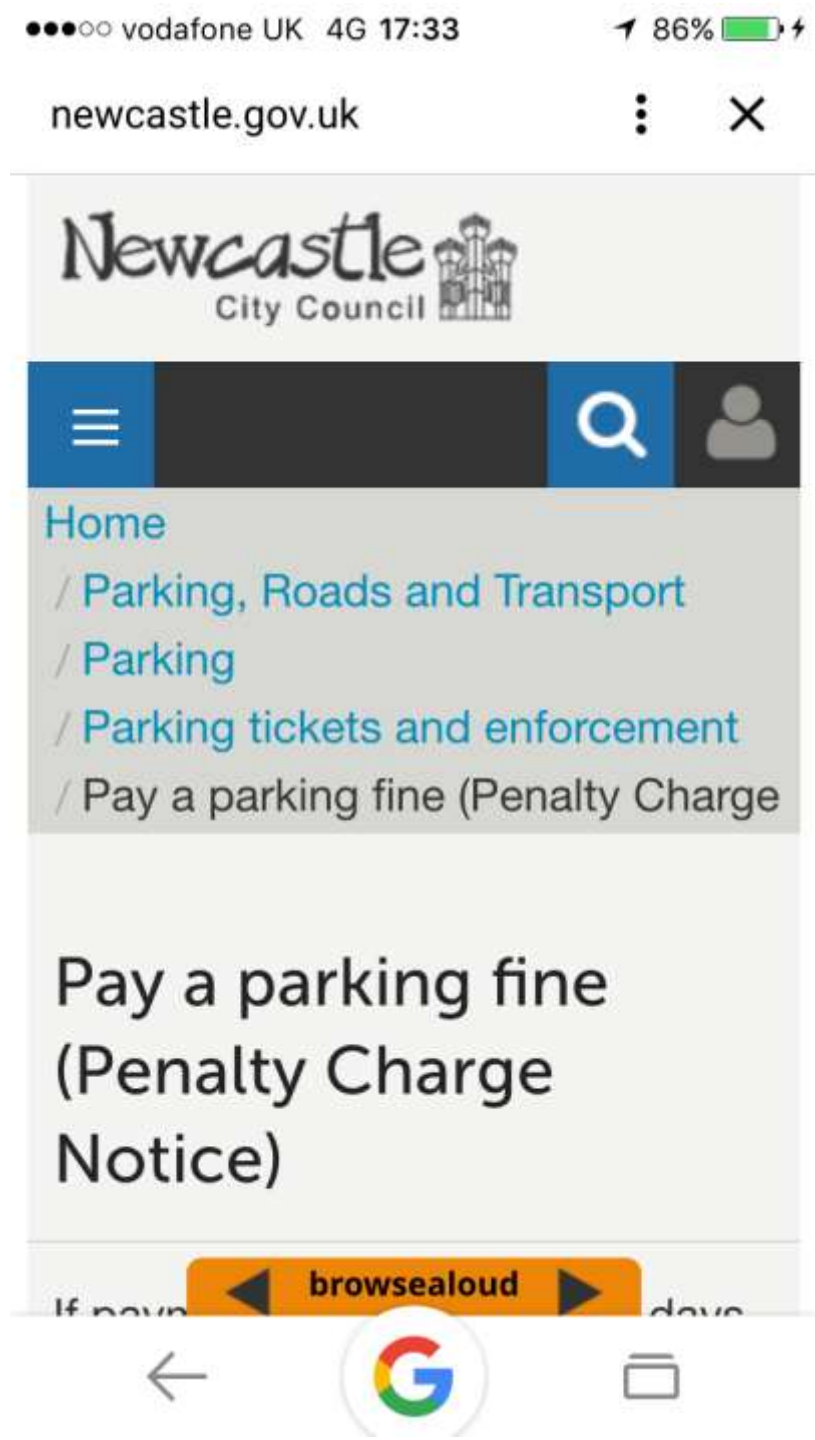the form start?

I need to pay
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Where does
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Where does
the form start?

5

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
the form start?

Pay a parking fine (Penalty Charge Notice)

If payment is made within 14 days of the date that the PCN was served a discount of 50% of the penalty charge is applicable (that is £25.00 or £35.00 would be due). Where a PCN has been issued following enforcement by the ANPR car (that are PCNs beginning with NU90) the 50% discount is available for 21 days after the joint PCN/Notice to Owner is served.

Pay online

Pay yo ◀ **browsealoud** ▶ nline

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Where does
the form start?

I need to pay
a parking ticket
in Newcastle.
I've lost the ticket.

Oh dear.

It's a form if it …

Looks like a form and works like a form

Asks questions and expects answers

Allows someone to achieve a goal
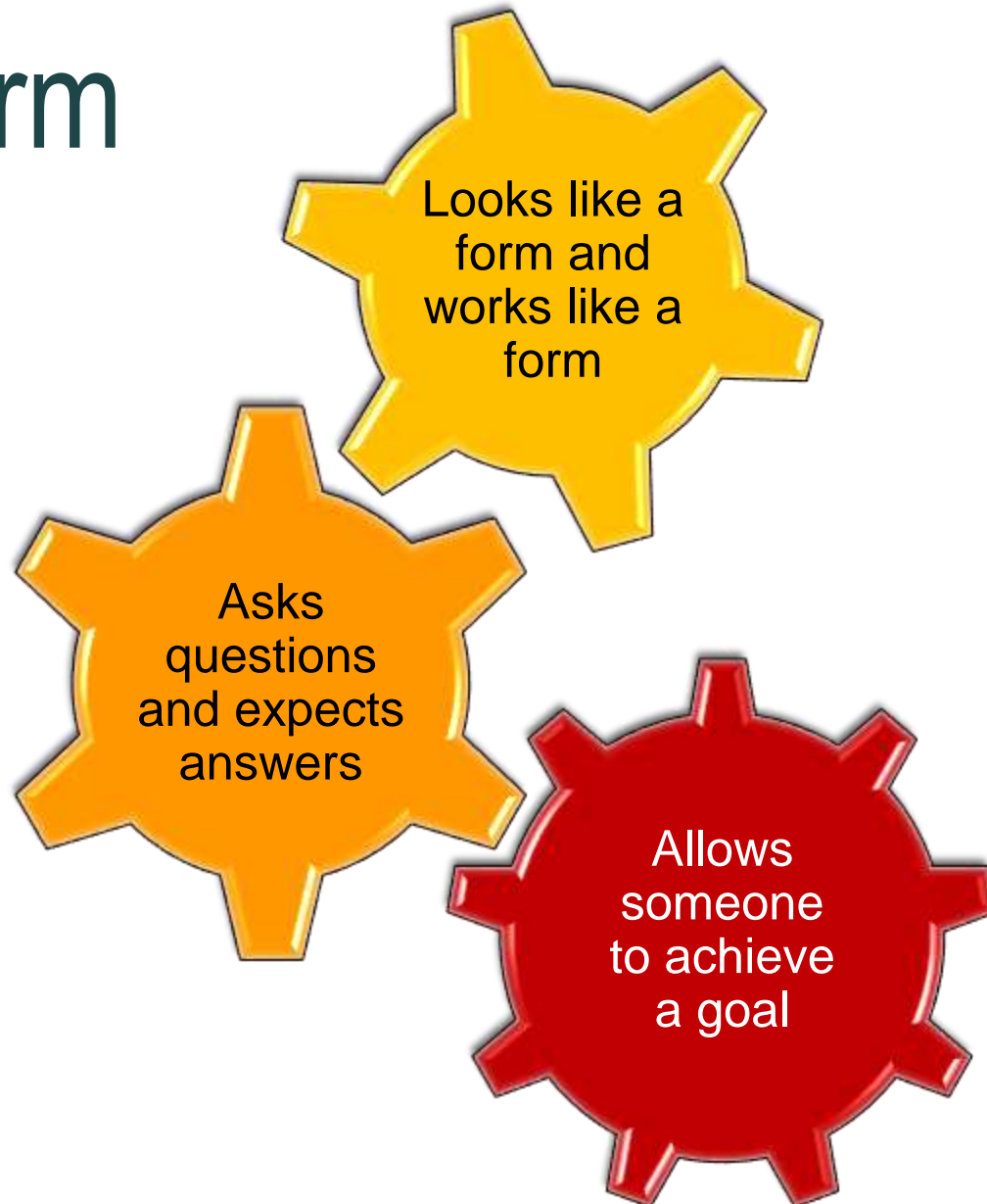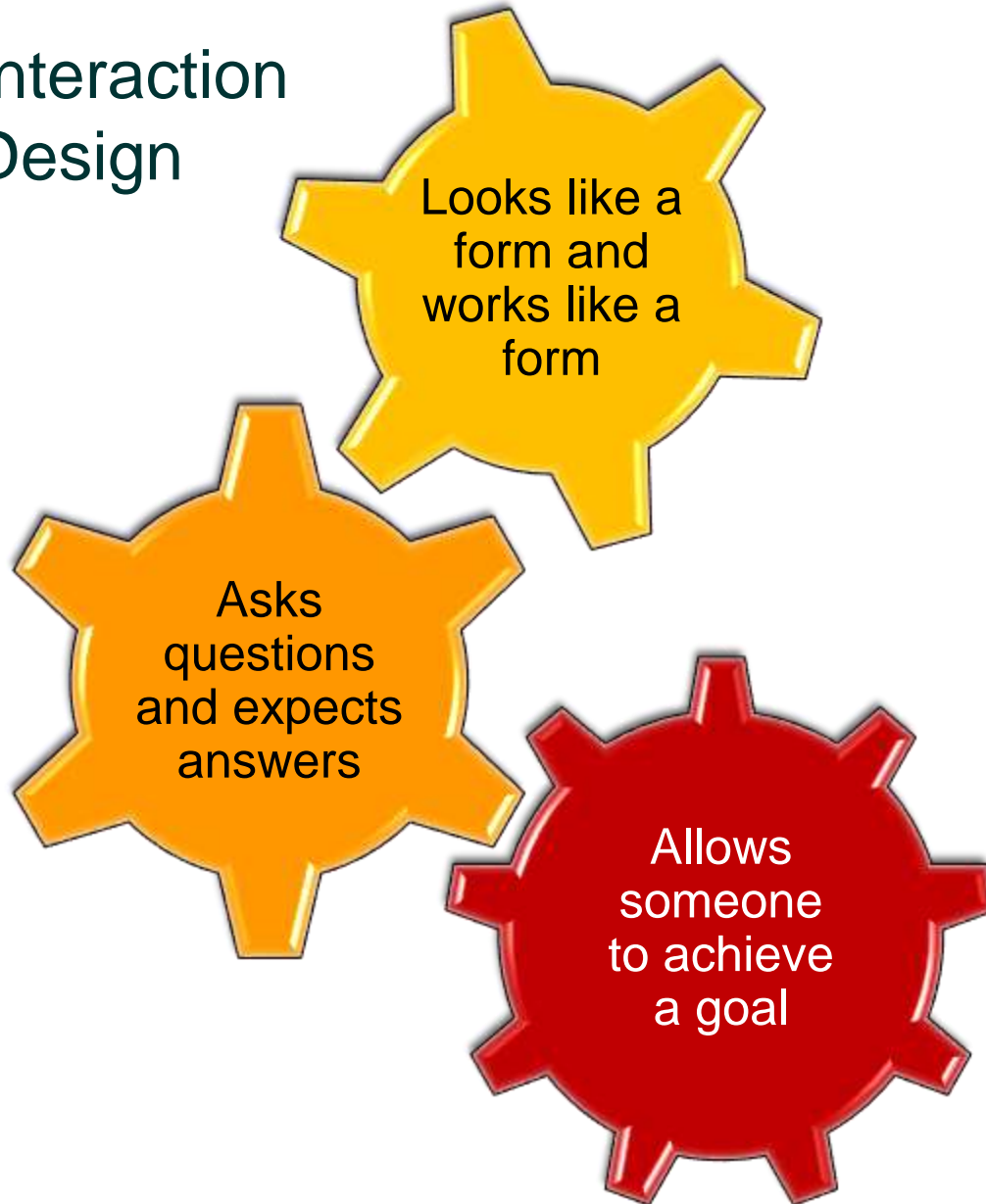
Interaction
Design

Looks like a
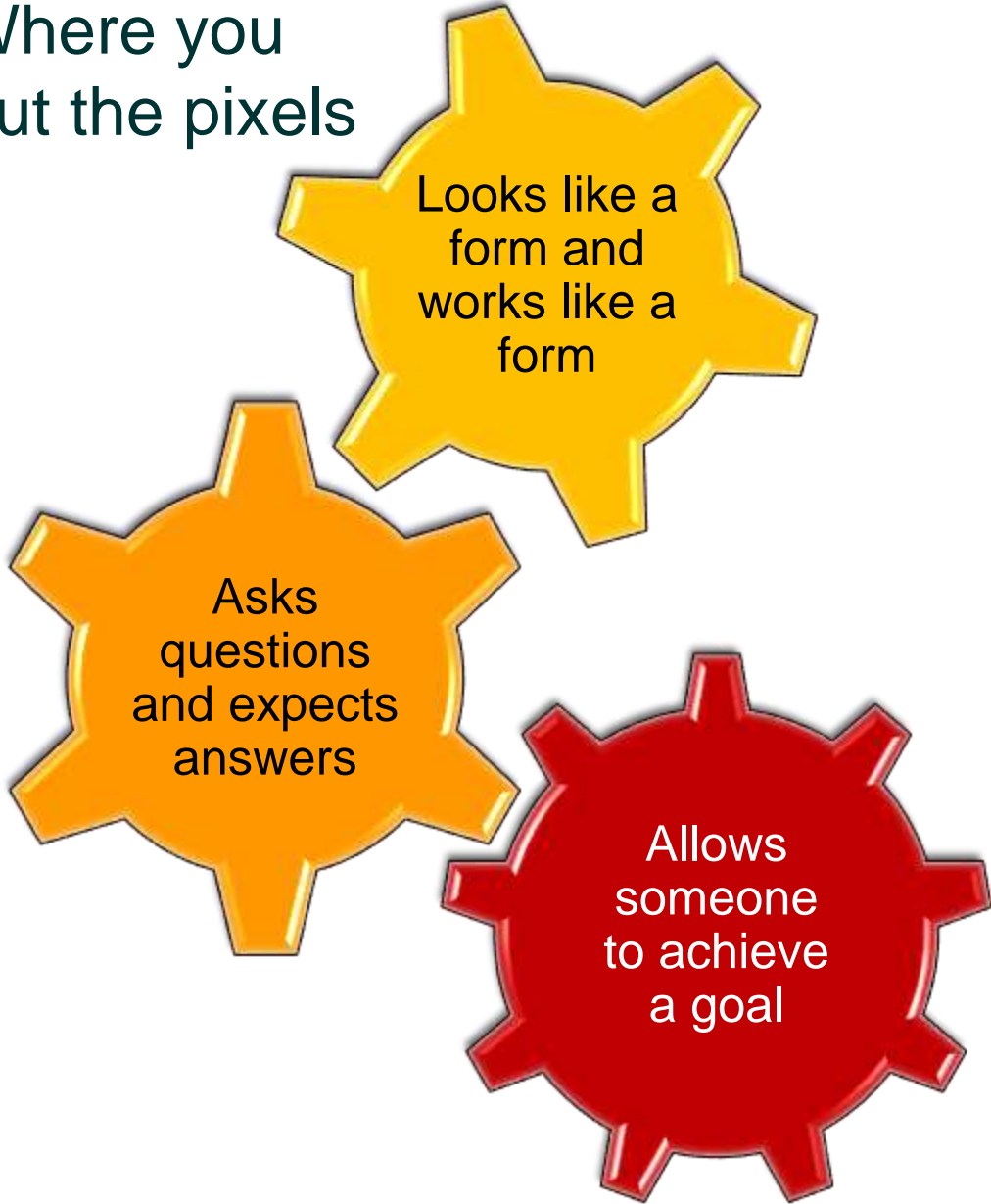form and
works like a
form

Content
Design

Asks
questions
and expects
answers

Allows
someone
to achieve
a goal

Service
Design

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'
needs

(and business ones)

A great form works well across all three layers

Appearance

Lovely and legible. Simple interaction

Conversation

Easy to understand and answer

Relationship

Goals achieved

How to look at a form

Step 1

Don't look at it

yet

Step 2

Choose a persona
Write the story of why that
persona is filling in the form

write down
your assumptions

"I've always loved the sea"

Image credit: Caroline Jarrett

Step 3

Fill in the form
as that persona,
as honestly as you can

keep notes

Licence

Get a licence for a burial at sea in England

Apply for this licence

Start now >

on the Marine Management Organisation service

Overview

You can apply for a marine licence to bury someone at sea:

- off The Needles, Isle of Wight
- between Hastings and Newhaven
- off Tynemouth, North Tyneside

You can also propose a new site when you make your application. You'll need to supply coordinates and evidence to demonstrate that the site is suitable for burials at sea.

> You'll be responsible for ensuring the coffin is built to the correct specifications.

The Marine Management Organisation (MMO) has the right to inspect the

Step 4

Now look at it
How did it work across
the three layers?

Appearance
Conversation
Relationship

Step 5

Do user research

Appearance: How do users interact in practice?
Conversation: What words do users actually use?
Relationship: What are the real users like?
                  What are their needs?

How to look at a form

1. Don't look at it.

2. Choose a persona and write the story of why that persona is filling in this form.

3. Fill in the form as that persona, as honestly as you can.

4. Now look at it.
   How did it work across the three layers?

5. Do user research
   Investigate your assumptions

Bonus: how to review anything

1. Don't look at it.

2. Choose a persona and write the story of
   why that persona is using this thing.

3. Try using the thing as that persona,
   as honestly as you can.

4. Now look at it.
   How did it work across the three layers?

5. Do user research
   Investigate your assumptions

Tips for user research on forms

Observe people as they use the forms

Image credit: Fraser Smith glenelg.net

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.

In some ways, paper is easier for discovery

Image credit: Katy Arnold @katyarnie

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.

How to write for a form

How to write for a service

Looks like a form and works like a form

Asks questions and expects answers

Allows someone to achieve a goal
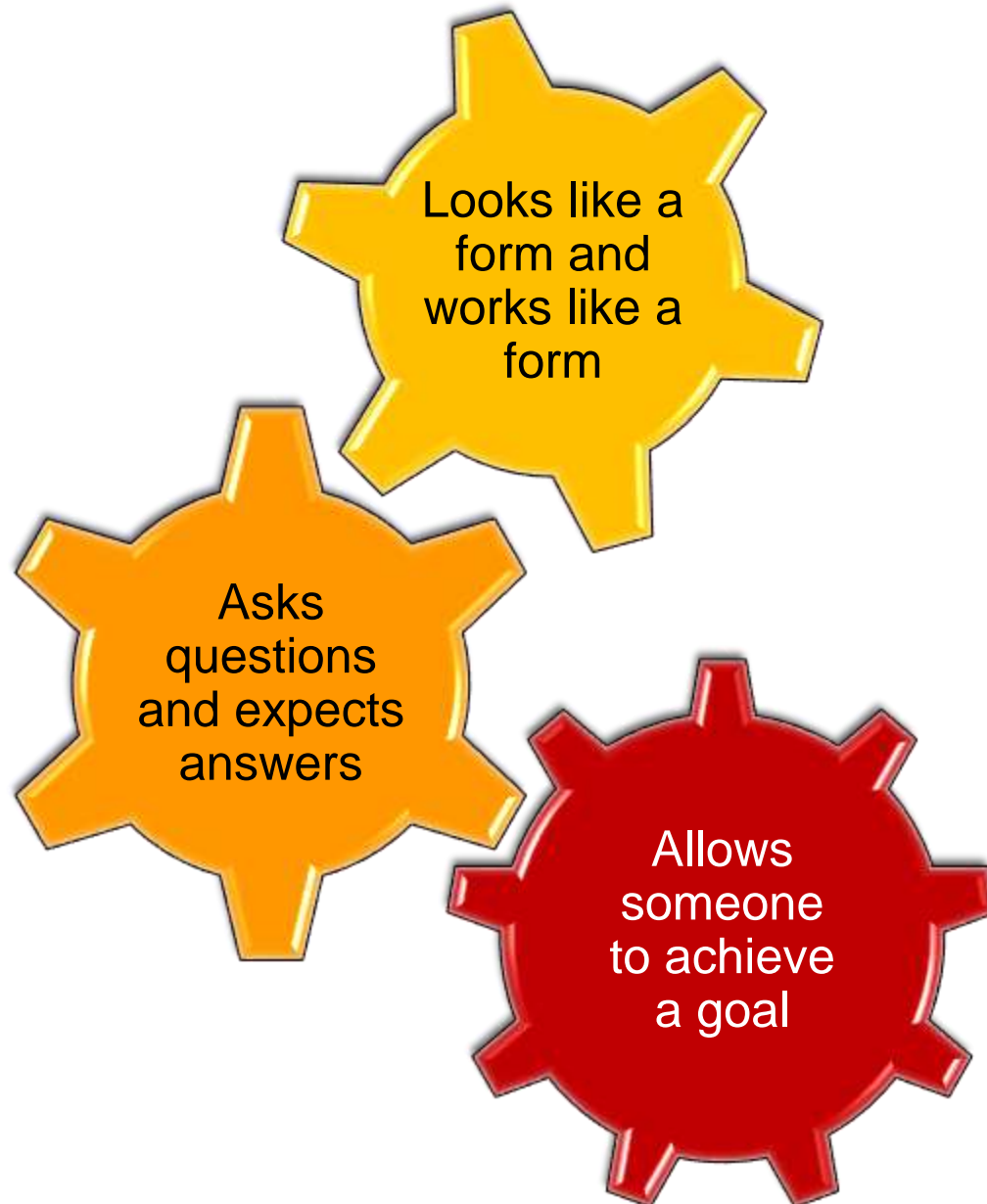
The answers you need

Form structure

How to structure web forms for GOV.UK services.

1. [Know why you're asking every question](#)
2. [Design for the most common scenarios first](#)
3. [Start with one thing per page](#)

https://www.gov.uk/service-manual/user-centred-design/resources/patterns/form-structure.html

When we're stressed, the amygdala grabs as much resource as possible. So, cognitive deficit.

Amygdala

Idea from Naintara Land   Image credit: http://www.memorylossonline.com/glossary/images/amygdala.jpg
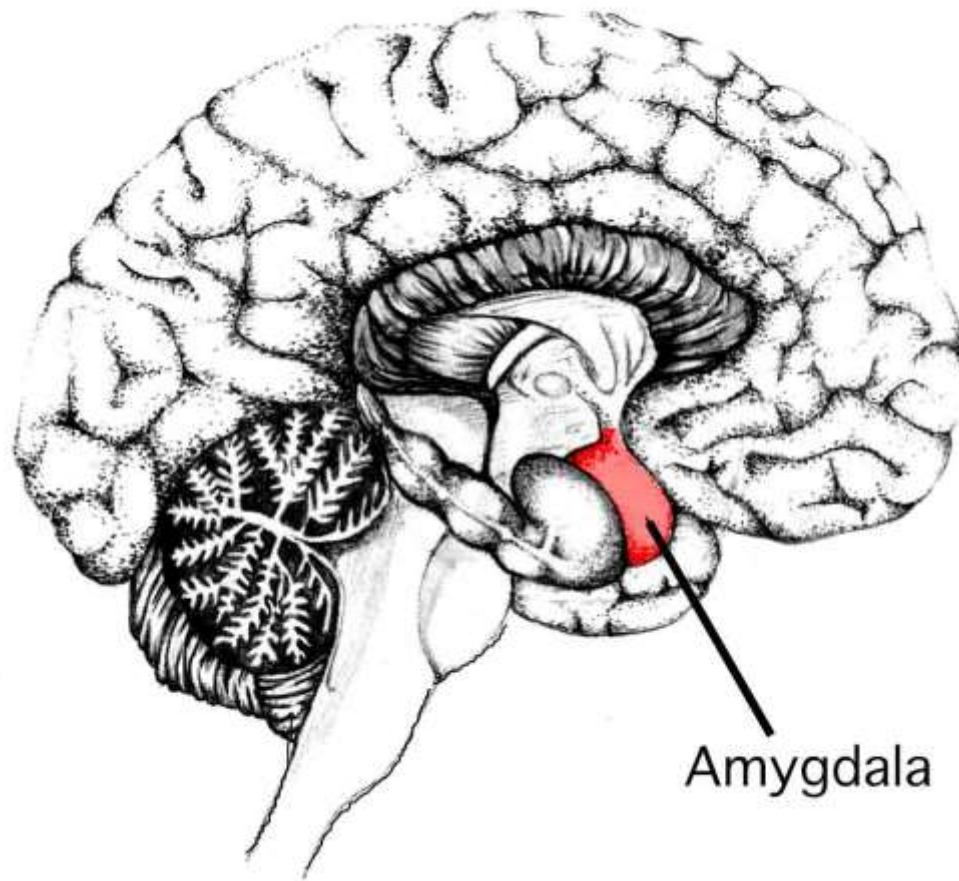
Many "easy" questions can trigger stress

Every time a website asks: "Male or Female?" and offers no opt-out, no "It's complicated," I pause. I have to think about what I want to answer and why. Do I check "female" to match the name I still give and the socialization I received? Or do I check "male" and risk someone noticing the discrepancy, because this reflects myself?

From "Design for Real Life"

Eric Meyer and Sara Wachter-Boettcher

https://abookapart.com/products/design-for-real-life
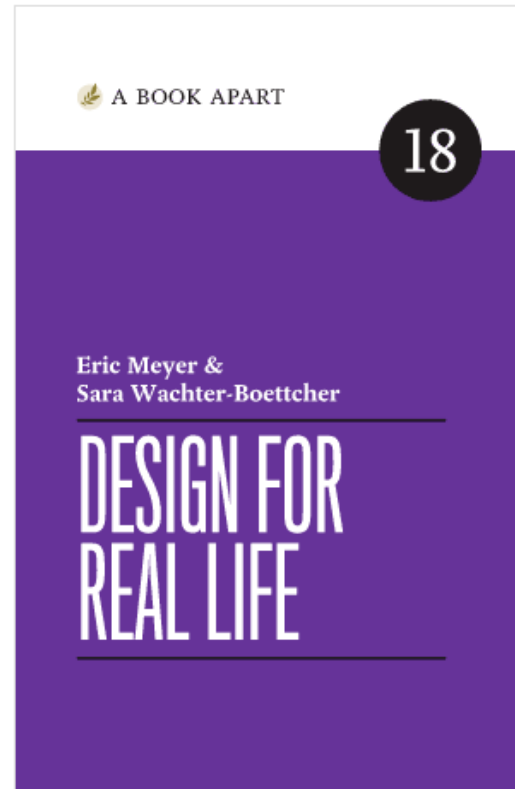
What's the most common circumstance?
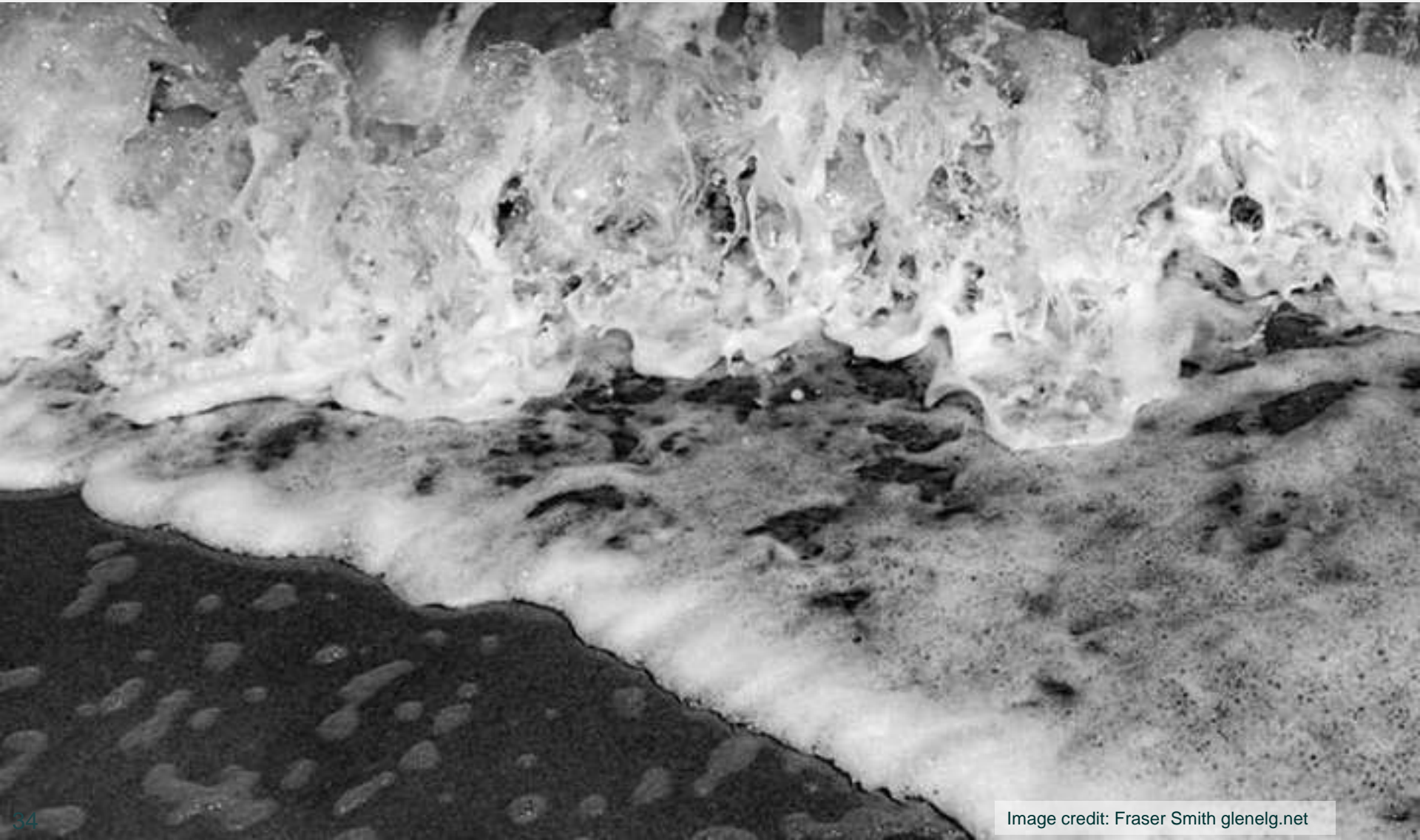
Image credit: Fraser Smith glenelg.net

The questions you ask

Looks like a form and works like a form

Asks questions and expects answers

Allows someone to achieve a goal
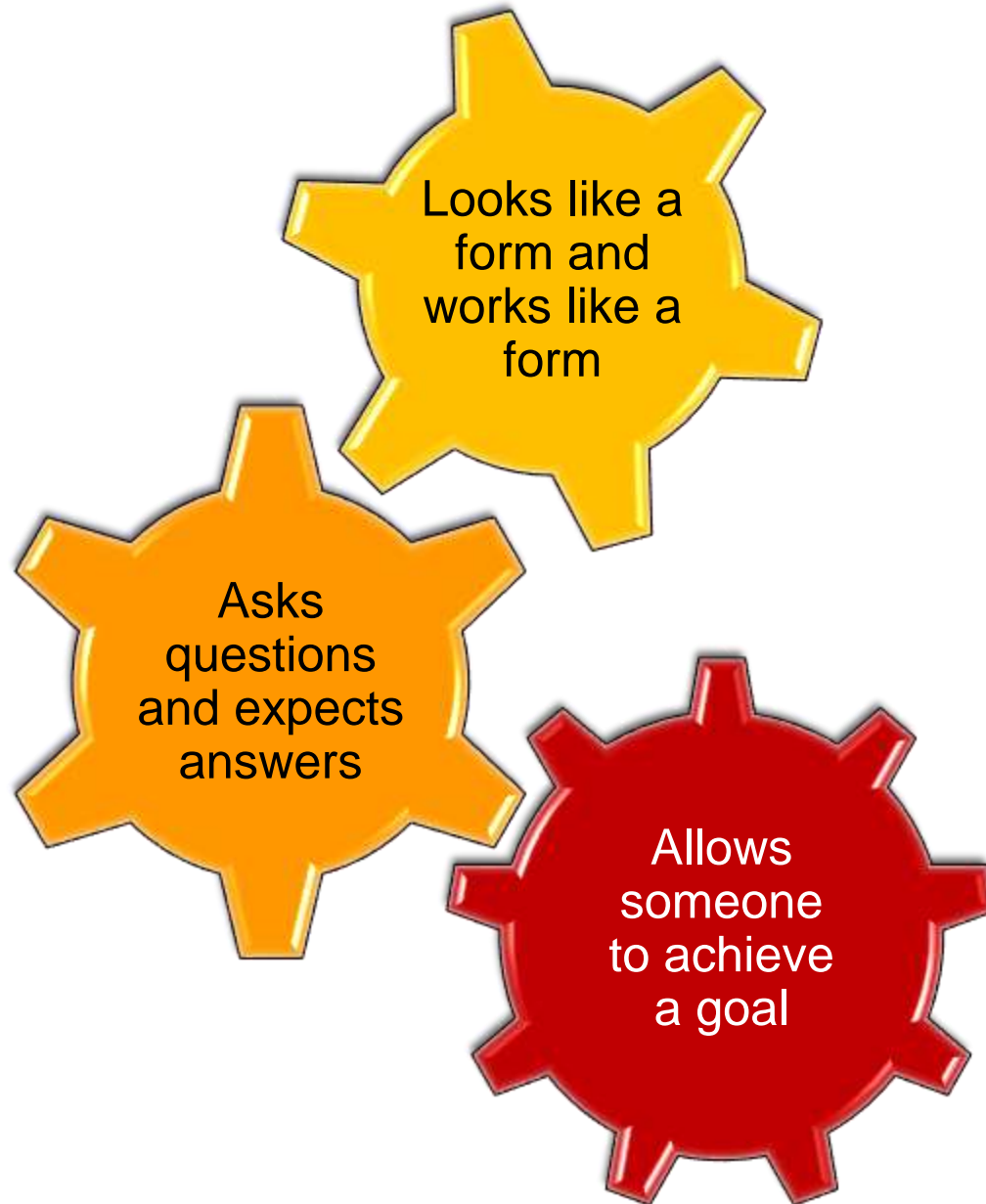
Questions with 'yes' and 'no' answers can be tricky

Do you or your partner get Child Benefit?

○ Yes   ○ No

If you're a dolphin,
are you more like a rhino or a shark?
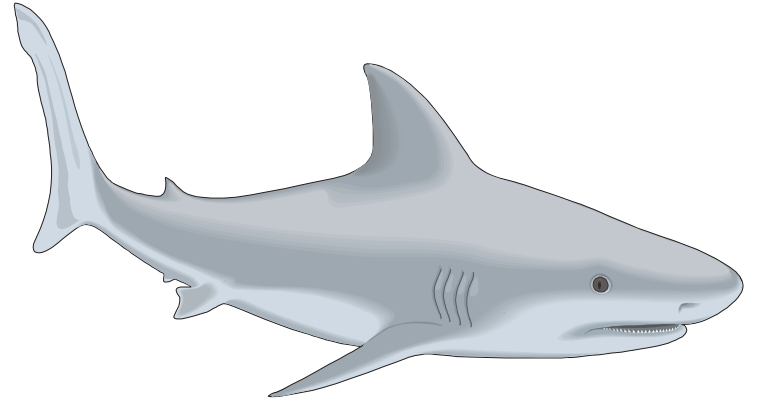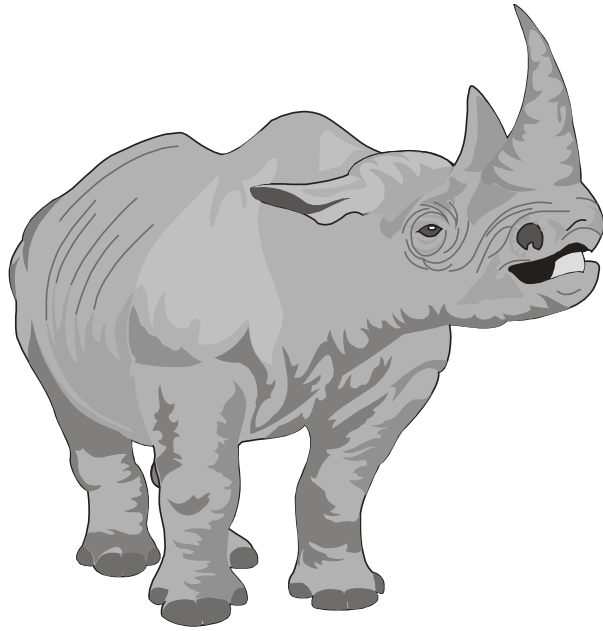
There are (usually) more answers in the world than in the official process

2. Did you find what you were looking for today? *

○ Yes, I found what I needed.

○ No, I was not able to find what I needed.

Question from a computer manufacturer's survey

Why ask for a telephone number?

Telephone Number

[   ] ⓘ

Organisation Name (Employer)

[   ]

Date Of Birth

[📅]

Security Question

[Select One   ▾]

Security Answer

[   ]

Why ask for a telephone number?

"You must enter this item"

Telephone Number

+44 (0)1525 370 379 ⓘ

Organisation Name (Employer)

You must enter this item

Date Of Birth

You must enter this item

Please join the discussion:
'What to say in error messages'

https://designpatterns.hackpad.com/
What-to-say-in-error-messages-HiGXPZ7XiG0

Where you put the pixels

Looks like a form and works like a form

Asks questions and expects answers

Allows someone to achieve a goal

Users don't want to read

http://mva.state.md.us   Image credits: Ginny Redish

Readers and rushers - tax forms

- Pensioners
- Lower-paid self-employed

- Tax office staff
- Accountants
- Higher-paid employed

Rushers do better

The Winner

Users want a 'quick start'

"Officials need to take a behaviourally realistic view of how citizens fill in forms and to cut back the length of guidance leaflets as well as forms themselves.
Forms and guidance should be designed to facilitate a 'quick start' approach by people."

National Audit Office 2002

People read forms differently
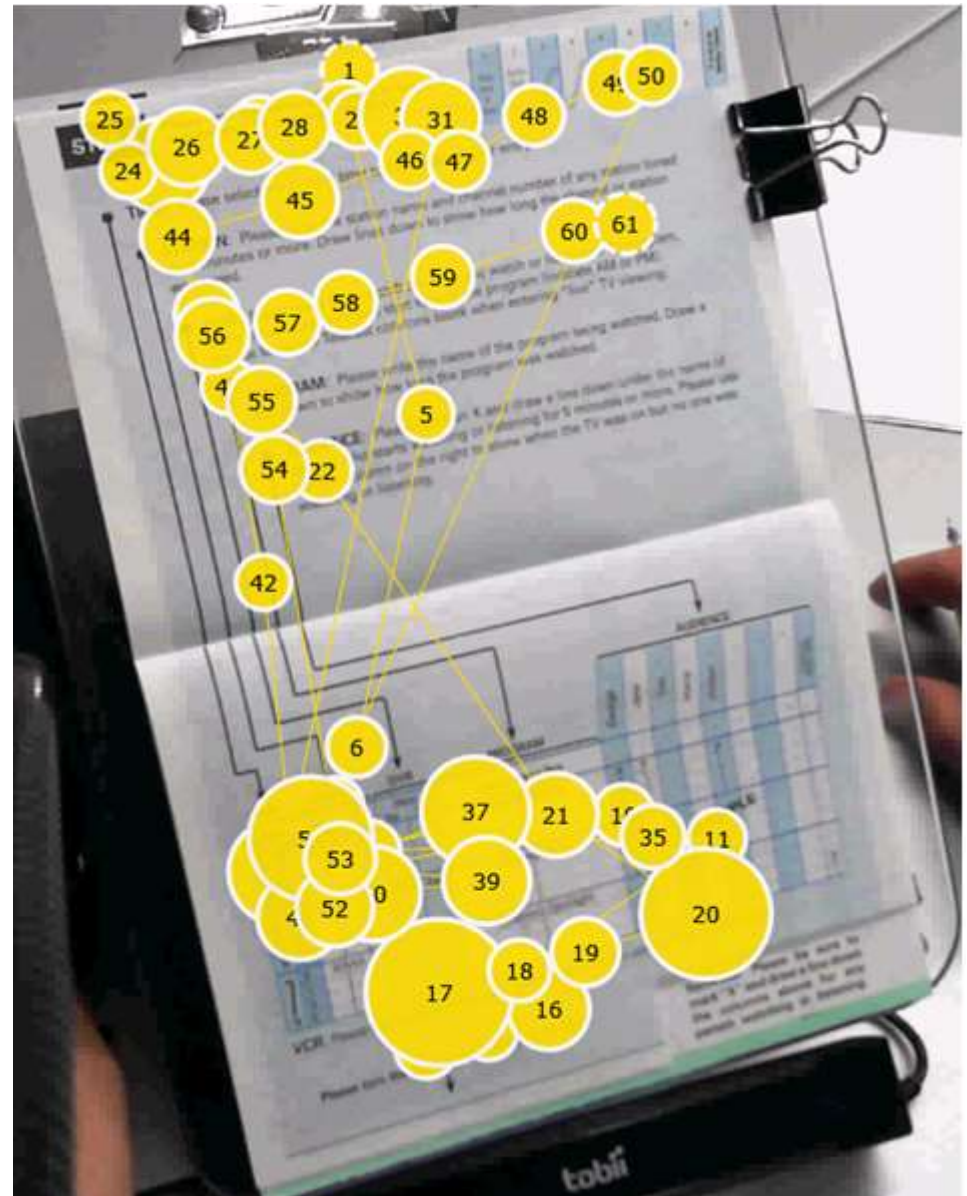
National Science Foundation
WHERE DISCOVERIES BEGIN

NATIONAL SURVEY OF COLLEGE GRADUATES

Please enter your username and password:

Username: [   ]
Password: [   ]
[Login]

For questions regarding this survey, contact:
nscg@census.gov
Phone: 1-888-262-5935

The **National Survey of College Graduates (NSCG)** is a longitudinal survey, designed to provide data on the number and characteristics of experienced individuals with education and/or employment in science and engineering (S&E), or S&E related fields in the United States. The NSCG provides the opportunity to study the education and career paths of the nation's college-educated individuals in the workforce such as salaries, whether the college-educated population was working in their highest degree field of study, specific occupations, and a gender breakdown of the workforce.

Image credit: http://www.uxmatters.com/mt/archives/2014/09/eye-tracking-in-user-experience-design.php

Image credit: http://www.uxmatters.com/mt/archives/2014/09/eye-tracking-in-user-experience-design.php
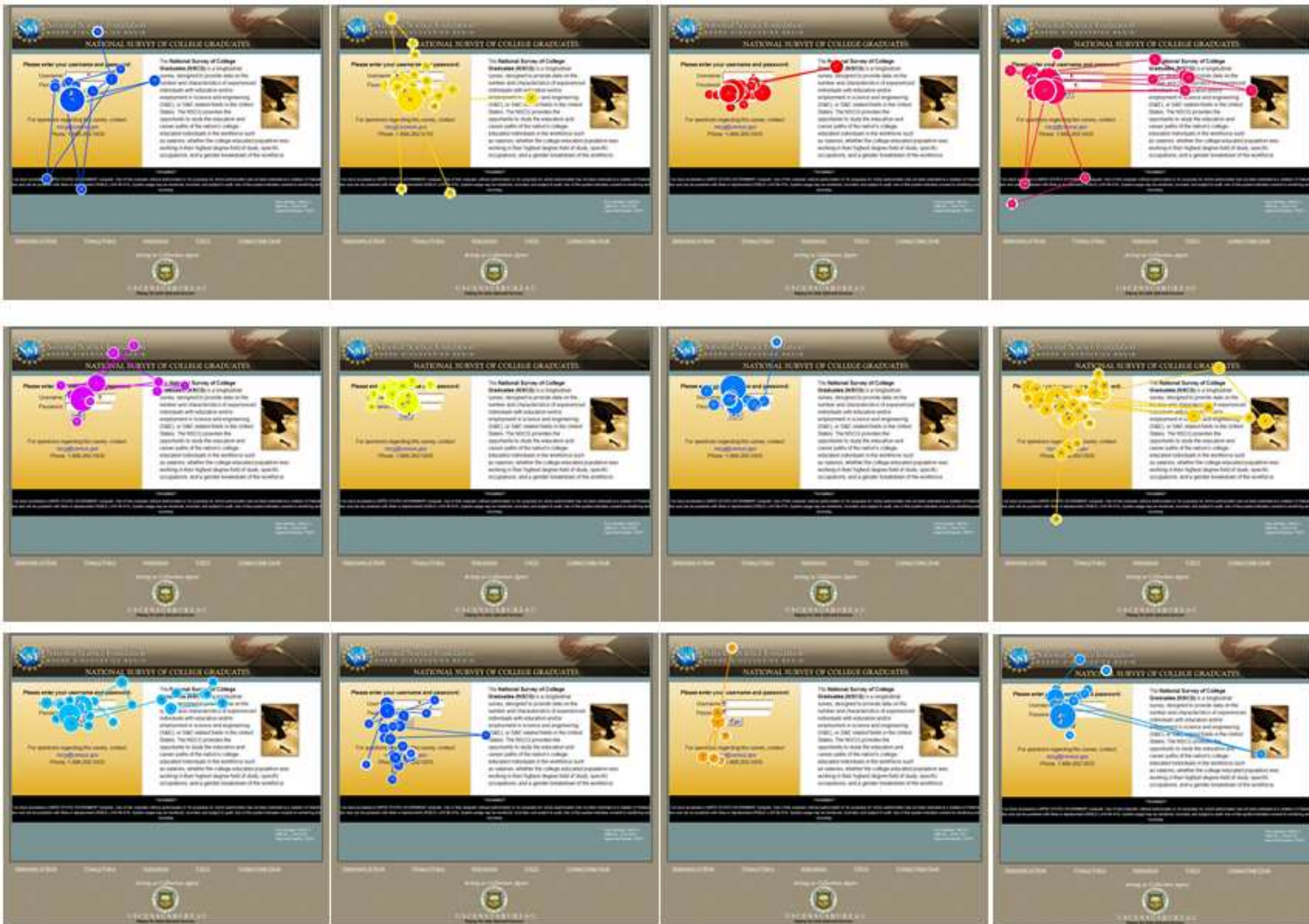
Accept the 'box suction effect'

Join us: working on design patterns

For published patterns, search for:

"service manual design patterns"

Or join us on

https://designpatterns.hackpad.com

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

Forms
that work
Understanding forms to
improve their design

Design tips
for surveys
2012
Caroline Jarrett
User Interface Engineering / Rosenfeld Media Seminar

◎ Effortmark

Design tips
for complex forms
Malta 2012
Caroline Jarrett

◎ Effortmark

Design tips
for complex forms
2011
Caroline Jarrett
J.Boye Conference Denmark

◎ Effortmark

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