How to look at a form

Industryconf 2016   Caroline Jarrett @cjforms
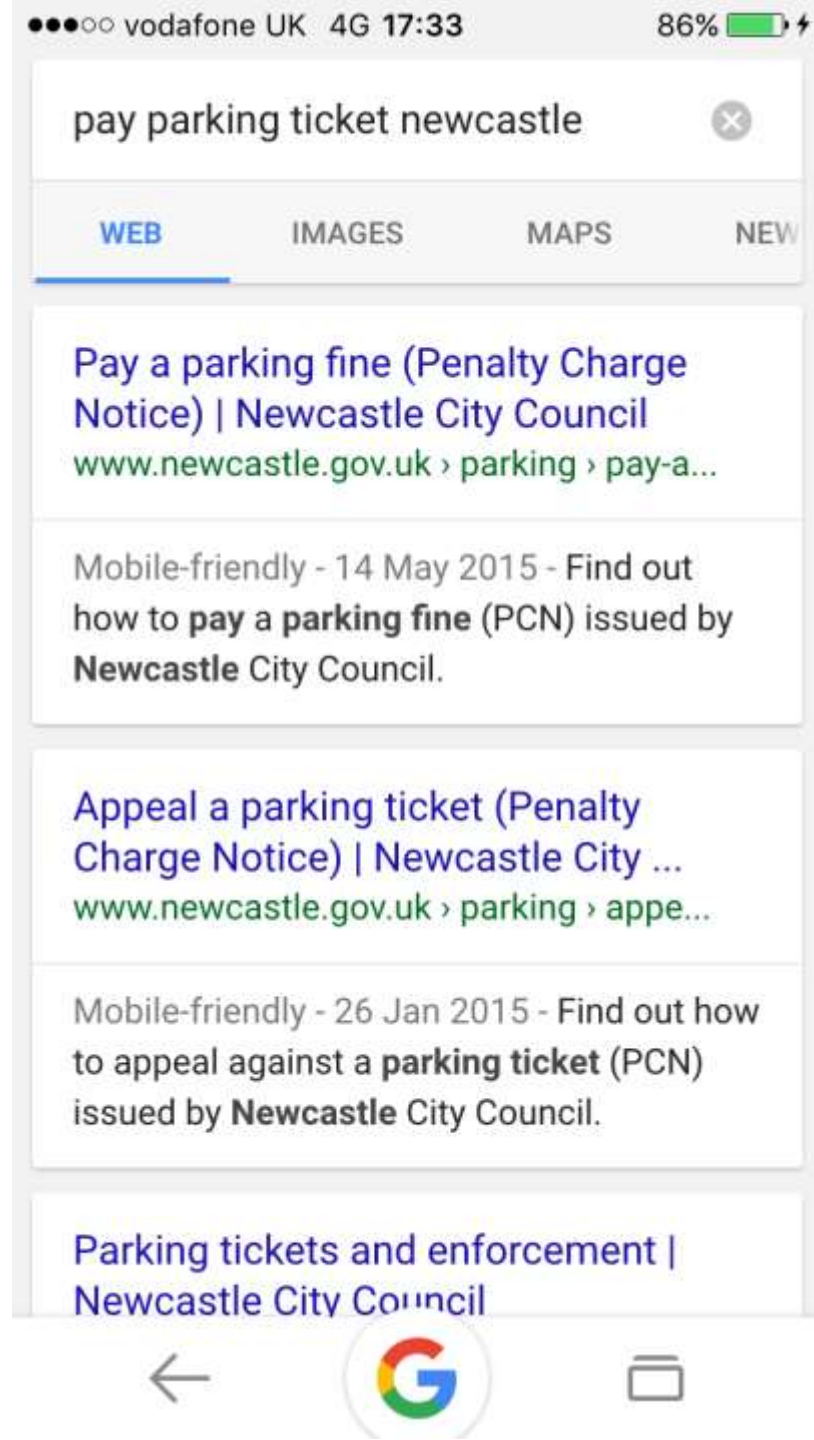
Paying for a parking ticket

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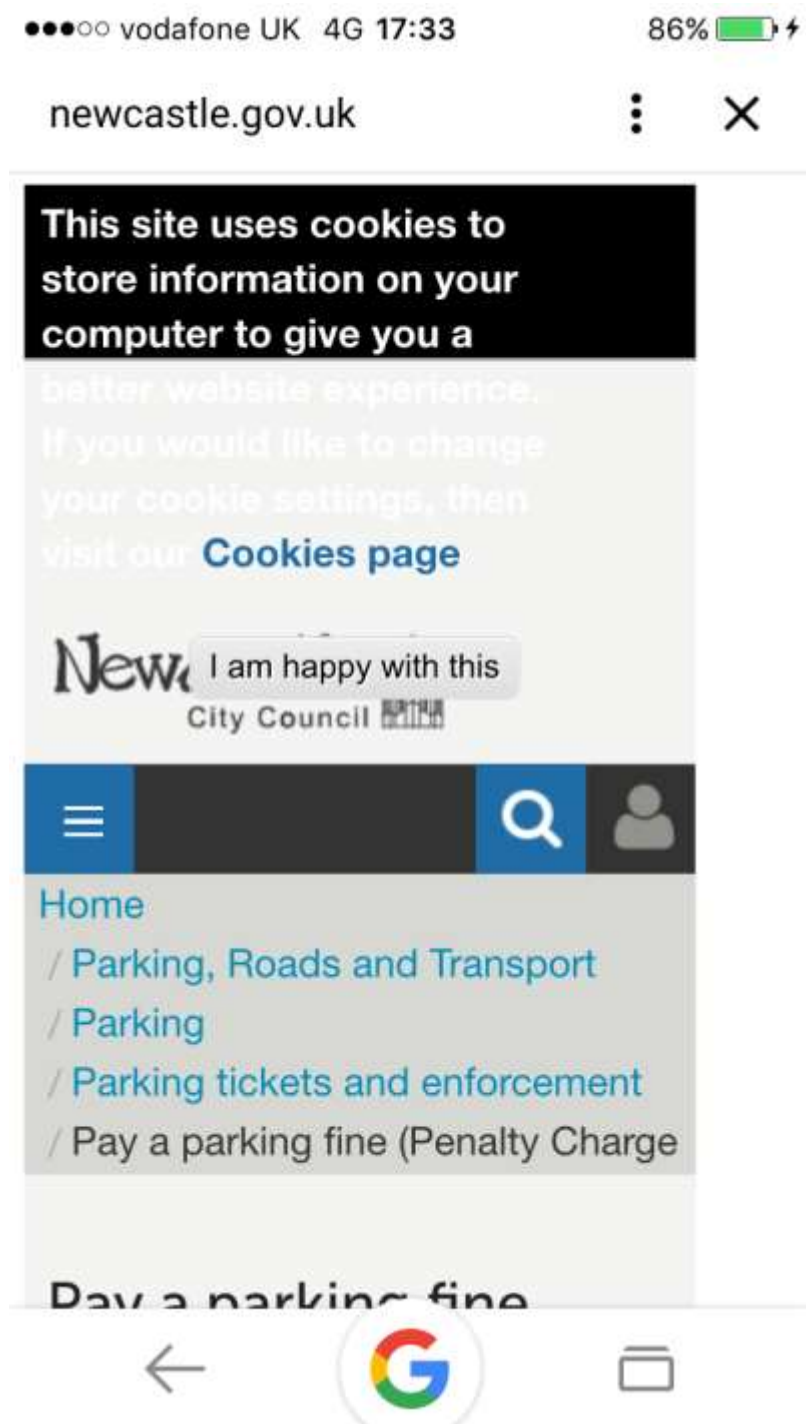a parking ticket
in Newcastle.
I've lost the ticket.

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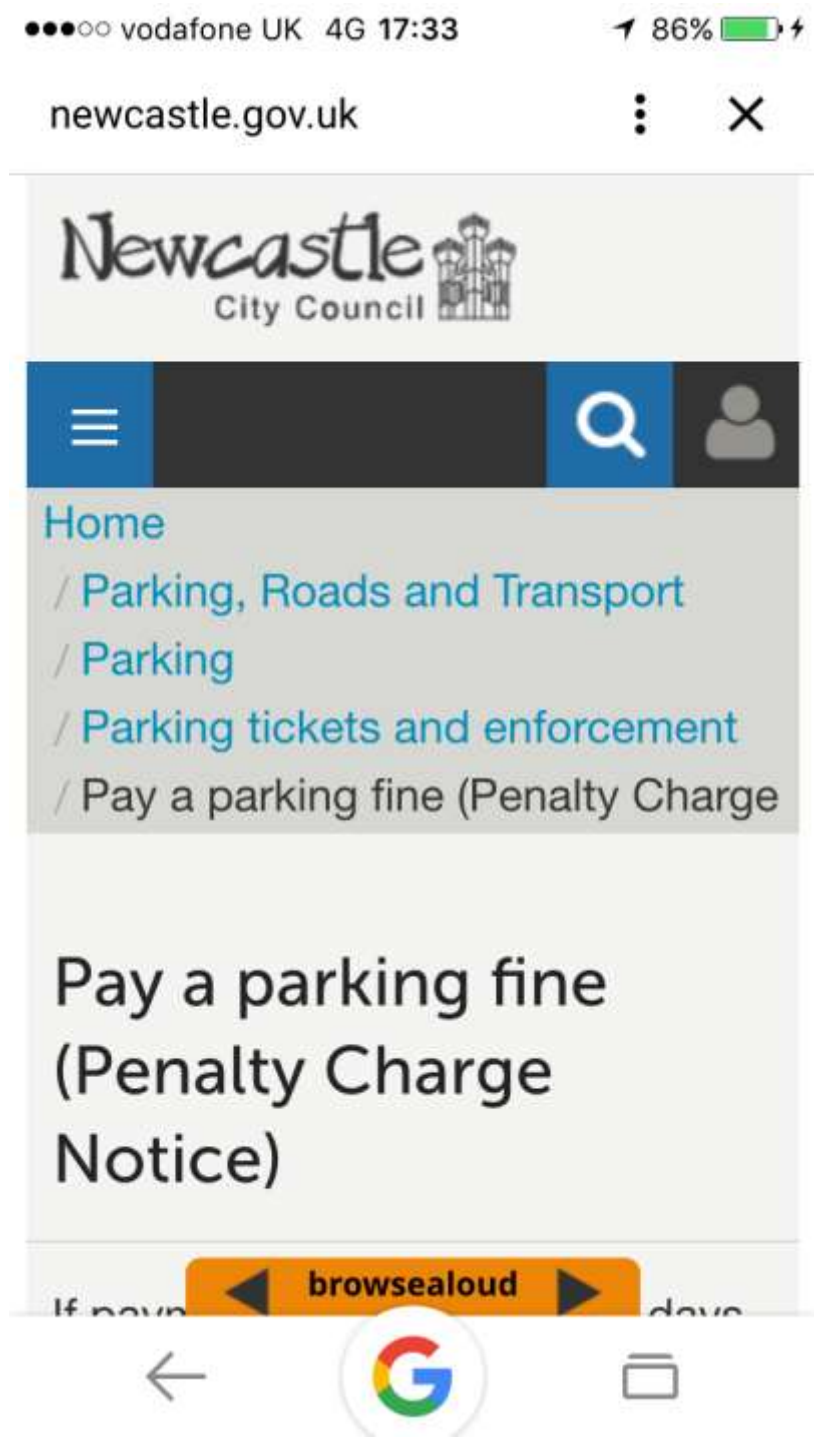I've lost the ticket.

Where does
the form start?

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

Here?

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

Or here?

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

Is this it?

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   online

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

Or this?

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

Allows
someone
to achieve
a goal

Users'
needs

The answers
you need

(and business ones)

A great form works well across all three layers
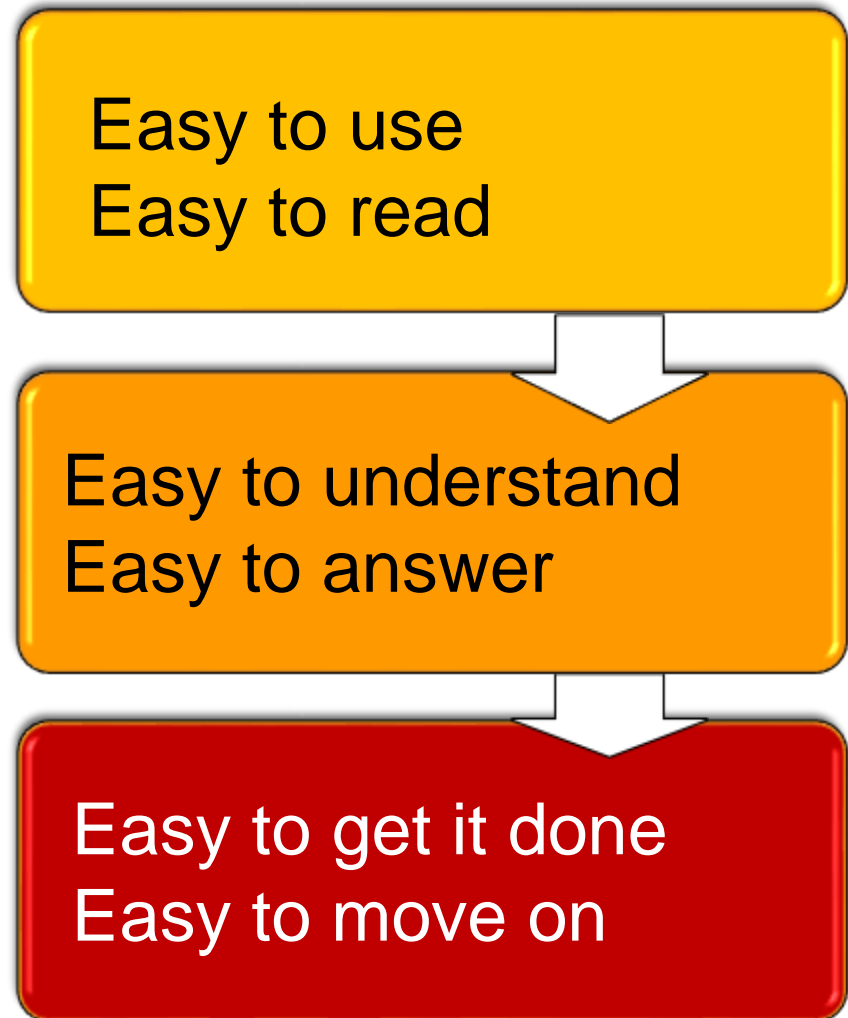
Appearance

Easy to use
Easy to read

Conversation

Easy to understand
Easy to answer

Relationship

Easy to get it done
Easy to move on

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 want to work with children"

Image credit: Milton Keynes Museum @mkmusem used with permission

Step 3

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

keep notes

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

Now you try it

Tip

Be kind.

Whenever we're looking at a form,
we know that people have worked hard
to improve it from the previous version.

Image credit: Caroline Jarrett

Remind yourself of the story

http://selby.ac.uk/
school-leavers-vocational/application-form/

http://bit.ly/indconftryit

Tip

Pick the most important thing

1 _____

2 _____

3 _____

Easy to use
Easy to read

Even simple questions can go awry

Tip

Don't put hints inside text boxes

http://www.uxmatters.com/mt/archives/2010/03/
dont-put-hints-inside-text-boxes-in-web-forms.php

Tip

Actually, don't put anything inside text boxes

http://www.uxmatters.com/mt/archives/2013/02/
dont-put-labels-inside-text-boxes-unless-youre-luke-w.php

Easy to understand
Easy to answer

Even simple questions can go awry

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
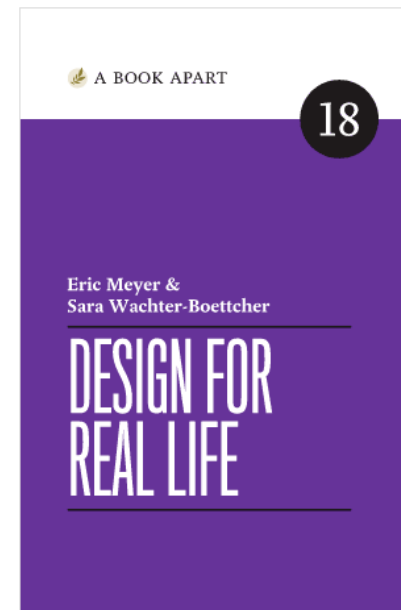
Better?

Simple language isn't always plain language

Are you working with any support agencies?

Please tick any that apply

- [ ] Social Services
- [ ] Youth Justice
- [ ] Mental Health Team
- [ ] REOTAS/Rubicon Targetted Youth Support

- [ ] Foundation Housing
- [ ] Young Careers
- [ ] Family Support Services

Not listed above?

Language is plain if we can...

Act

Understand
what we find

Find what
we need

Inspiration: Ginny Redish's definition http://www.plainlanguage.gov/whatispl/   Images: shutterstock.com

Tip

Test your forms with people

Ask them to explain to you what the questions mean to them, and what answers they would like to give.

Image credit: Caroline Jarrett

If you're a dolphin, are you more like a rhino or a shark?

Image credit: Corel Draw
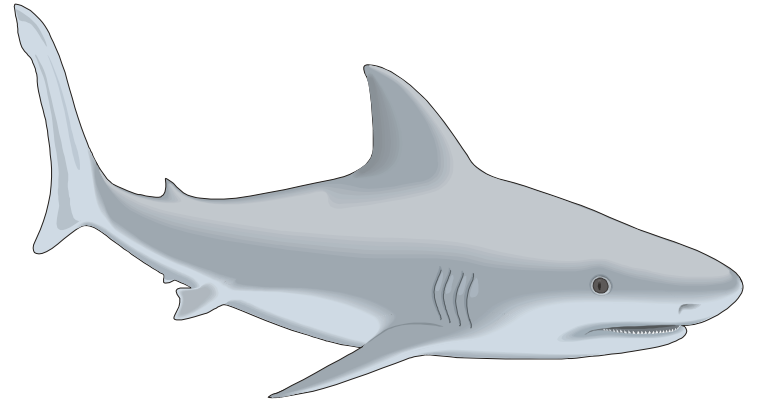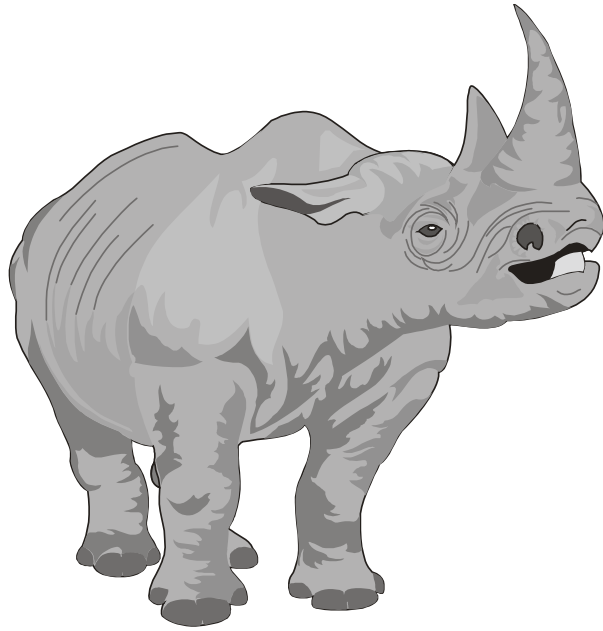
Easy to get it done
Easy to move on

Questions with only 'yes' and 'no' answers can be tricky

Have you applied for of will be applying to any other colleges for a course in 2016?

◯ Yes   ◯ No

Some possible answers to the question

Are you applying for any other courses?

- o Yes, in 2016

- o It depends on whether this application is successful

- o Maybe, in 2017

- o No, this is the only course I want to do

- o No, because this is the only college near enough to my home

- o Why are you asking? Will the answer affect my application?

Tip

Track a sample of forms through your process to find out how you use the answers

A great form works well across all three layers

Appearance
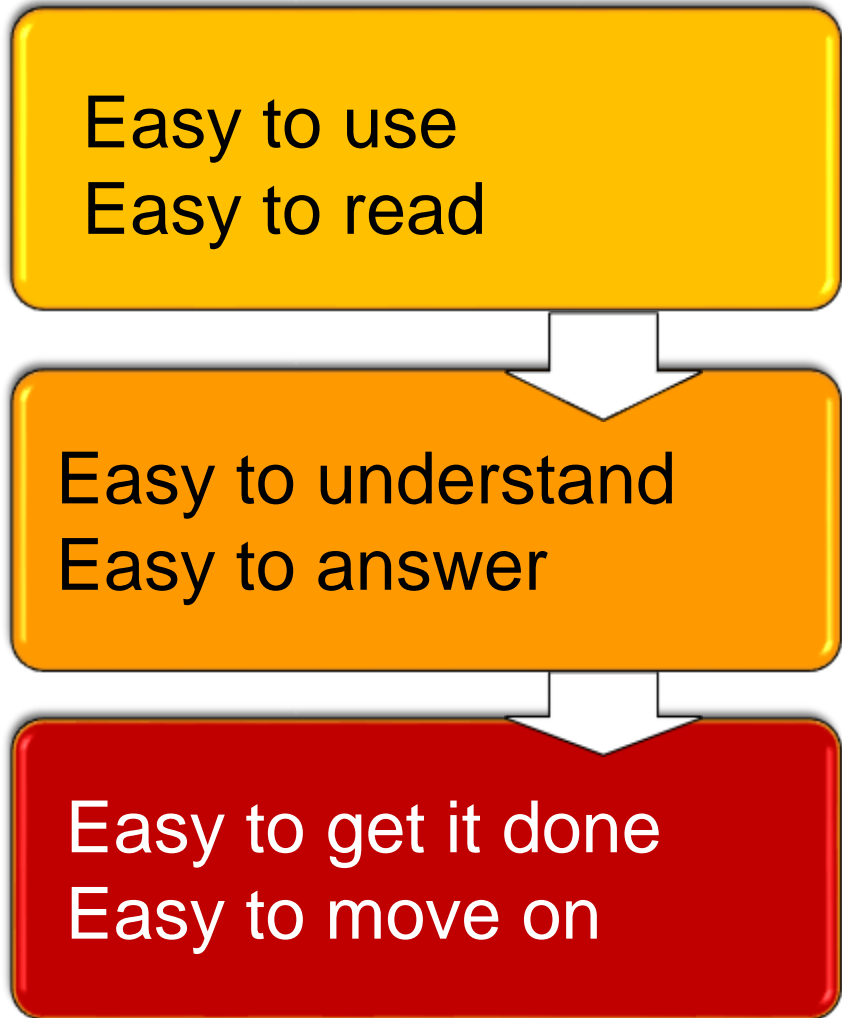
Easy to use
Easy to read

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Easy to move on

Schema from "Forms that work: Designing web forms for usability", Jarrett and Gaffney (2008) www.formsthatwork.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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www.effortmark.co.uk

User Interface Design and Evaluation

Forms that Work — Designing Web Forms for Usability. Caroline Jarrett • Gerry Gaffney

Surveys that work (in progress)