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Web Forms Redesign Guidance Document

Oxford City Council Web forms V1.0

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1 THE PURPOSE OF THE DOCUMENT

This document is intended to highlight industry best practice that should be applied to Oxford City Councils online web forms and as a basis for the redesign of the current solution. This document should also serve as a “how to” guide for future deployment of forms.

The document features categories that are present in the matrix. Found within the categories are best practice fixes for each element that should be applied, along with how this should be achieved.

2 ISSUE CATEGORY

2.1 FORM DISTRACTIONS

As with a conversation, users get distracted by background noise – for instance, items such as unnecessary navigation and text have been proven to cause distraction for users filling out the forms. So, remove clutter such as the data protection copy from the bottom of all form pages and unnecessary right hand "do it online" navigation. Keeping the forms simple and clutter free will help the flow of the conversation between Oxford City Council and the user ultimately increasing usability.

2.2 VALIDATION

Server-side validation is used to successfully validate forms for errors and also to securely protect against incorrect or malicious data. In addition to server side validation, and for better user experience, client side validation should be provided. With client-side validation the form never gets submitted if validation fails. By using script languages user's input can be validated as they type. This means more responsive, visually rich validation and as such get immediate feedback if validation fails.

2.2.1 VALIDATION ERROR MESSAGE

This alerts the user to information that is incorrect or blank and it usually prevents them from proceeding further in the form. Emphasize error messages through colour, normally red, and for further accessibility and visual aid use iconography such as an "x" or warning sign (see figure 1) and prominence, typically beside where the error occurred.

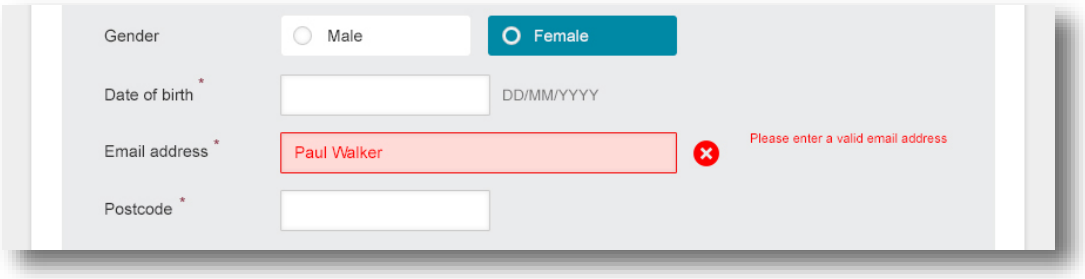

FIGURE 1 –GOOD EXAMPLE OF VALIDATION ERROR MESSAGE

2.2.2 VALIDATION SUCCESS MESSAGE

Like error messages, the "success" message alerts the user to correctly completed input and allows for instant validation and feedback. Emphasize success messages through colour, normally green, and for further accessibility and visual aid use iconography such as a tick (see figure 2). Success messages should be prominent, but they should not hinder the user from continuing.

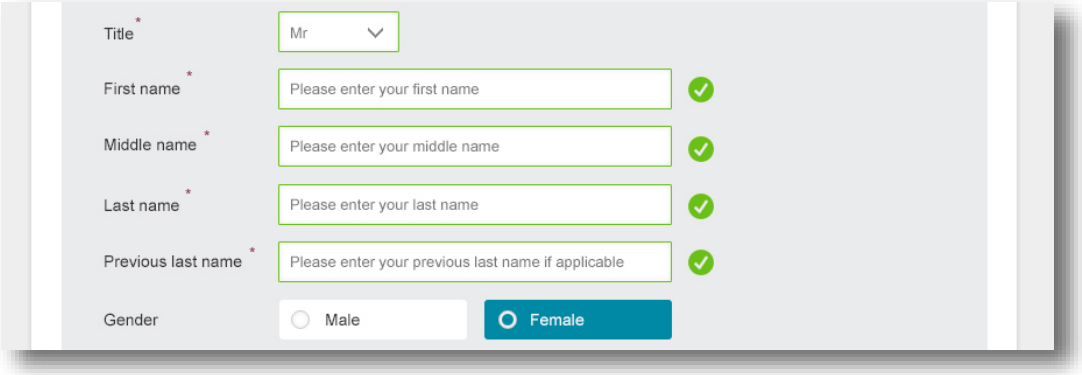

FIGURE 2 – GOOD EXAMPLE OF VALIDATION SUCCESS

2.2.3 REQUIRED INFORMATION

Required fields should be clearly marked within the form to inform users about what information is required for progression.

The most common way to mark required fields is with an asterisk (*). However, not all users know the meaning of an asterisk sign. Beginners or older users are very likely to have only a general idea of what an asterisk might mean. This is the reason why it is a good practice to either put a note on the top of the form that indicates that all fields marked with an asterisk are required or to use required field markers. In the case where all fields are required there is no need to place asterisks or markers in the form. A simple message that all fields are required is enough.

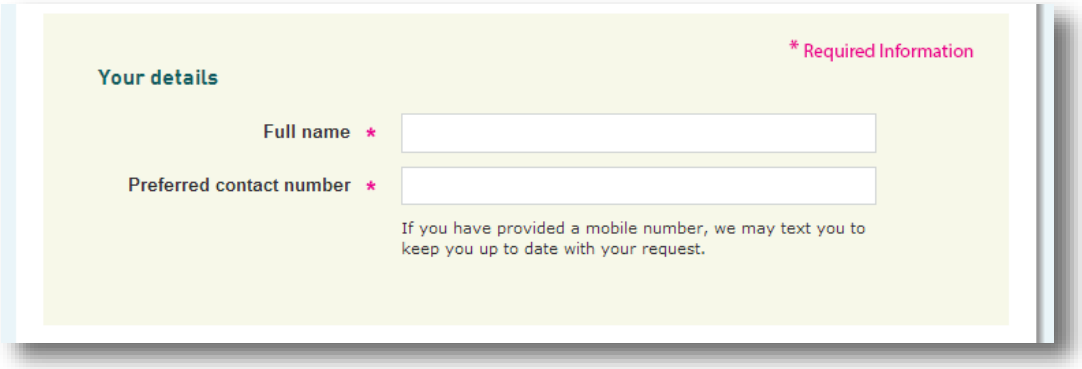

FIGURE 3 - REQUIRED INFORMATION EXAMPLE

2.3 UNNECESSARY DATA CAPTURE

2.3.1 UNNECESSARY FORM FIELDS

A form is a conversation between Oxford City Council and the user. Excessive and unnecessary questions will leave the users feeling frustrated, and (if they do not leave) will likely result in the form being filled out incorrectly.

In a conversation, you would become wary of someone who asked questions that were out of place or unnecessary - the same thing happens online. Keep questions within the scope of the form and consult with

relevant stakeholders and departments to make sure you are only asking for information that is absolutely necessary.

2.3.2 UNNECESSARY STEPS

Our form analysis found that many of the forms suffer from excessive steps, with most having a minimum of five. While there is no hard rule for the amount of steps in a form, it is our recommendation (and good usability practice) that all form processes are reduced to a minimum. Users are wary of long tedious processes online and this will undoubtedly lead to higher bounce rates, low conversion rates or even bypassing the form and phoning the call centre.

To address this concern, aim to reduced field lengths, apply the correct use of form fields, group information logically and reduce unnecessary information requests. See further information on these steps below.

2.3.3 GROUPING OF RELEVANT INFORMATION

Group related information, such as personal details or report details together. The flow from one set of questions to the next will better resemble a conversation. This can be achieved by grouping the questions within a light coloured box (see figure 4)

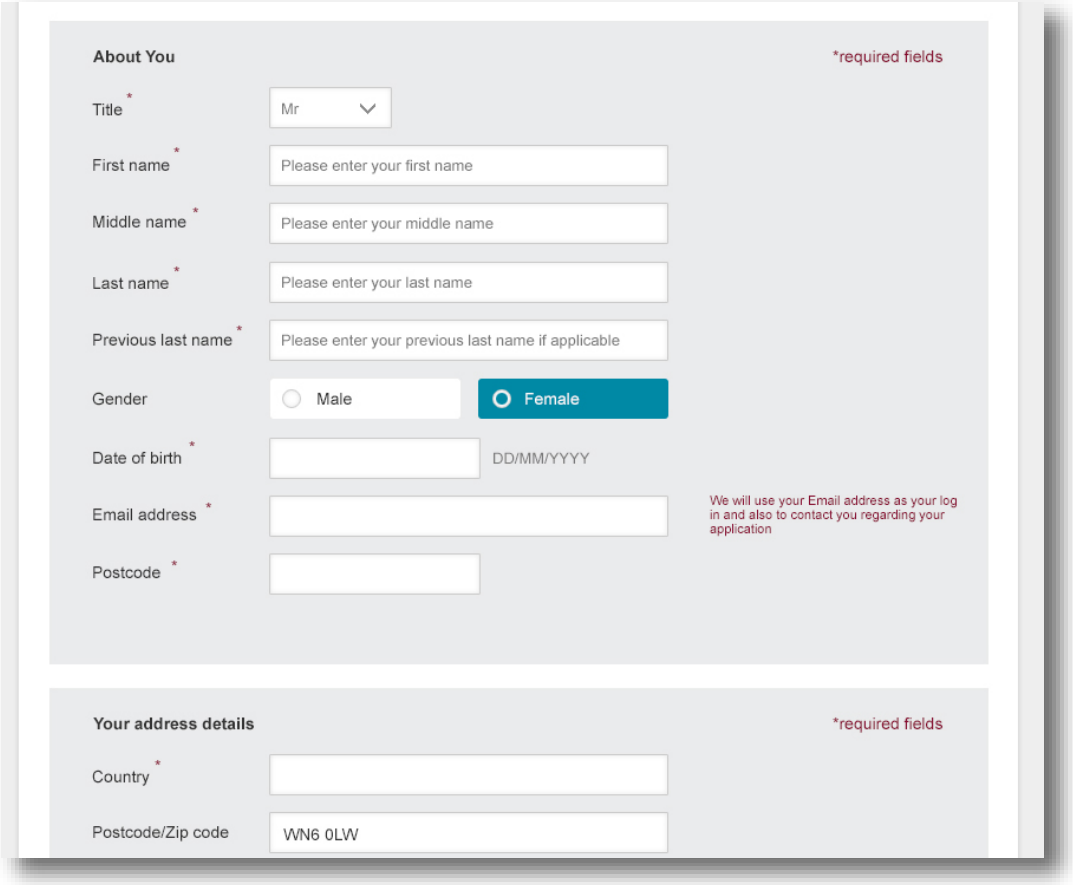

FIGURE 4 – EXAMPLE OF CONTENT GROUPING

2.4 FIELD LABELLING

If the purpose of a label is simple, such as to ask for a name or email address, then a word or two will be fine. However a phrase or sentence might be necessary to eliminate ambiguity on some of the more complex fields.

Order the labels logically, reflecting the natural flow of a conversation. In a conversation you would normally ask personal questions first with more involved questions towards the end. This logic should be applied to the online forms.

Sentence case is easier to read grammatically than title case. So we recommend this approach for labels. Don't use full uppercase this looks unprofessional and is difficult to scan.

2.5 UNNECESSARY COPY ON FORMS

A form is a means to establish or enhance a relationship between the user and Oxford City Council. As such the language should be used according to your audience. Knowing your users will also help you choose appropriate language for the forms and remove superfluous text. Instructions and text on pages should be kept to a minimum making it succinct and easy to read.

All content and copy should be tested by using a Flesch–Kincaid readability scoring system which is designed to highlight the comprehension difficulty in a passage of text.

2.6 MAP LOCATION SELECTOR

It should be clear to the user that they have 2 ways in which they can identify a location:

1. Enter a postcode and have the pin appear at the centre of that postcode area, which they can then drag to the exact location.
2. Place the pin on the map themselves; this can be done by either dragging it from a neutral location onto the map, or (as in the live example linked to below) zoom into the map until a pin appears, and then drag it to the exact location

Manchester.gov.uk shows a good example of a map location selector:
https://secure.manchester.gov.uk/forms/form/719/en/report_a_pothole_road_or_pavement_damage

We would also advise that the ability for a user to zoom in/out of the map using the scroll wheel on their mouse be disabled. The map should provide the user an interface to zoom in/out as demonstrated in figure 5. This ensures the user can't accidentally zoom in/out after entering a postcode and losing their pin all together, as demonstrated numerous times in usability testing.

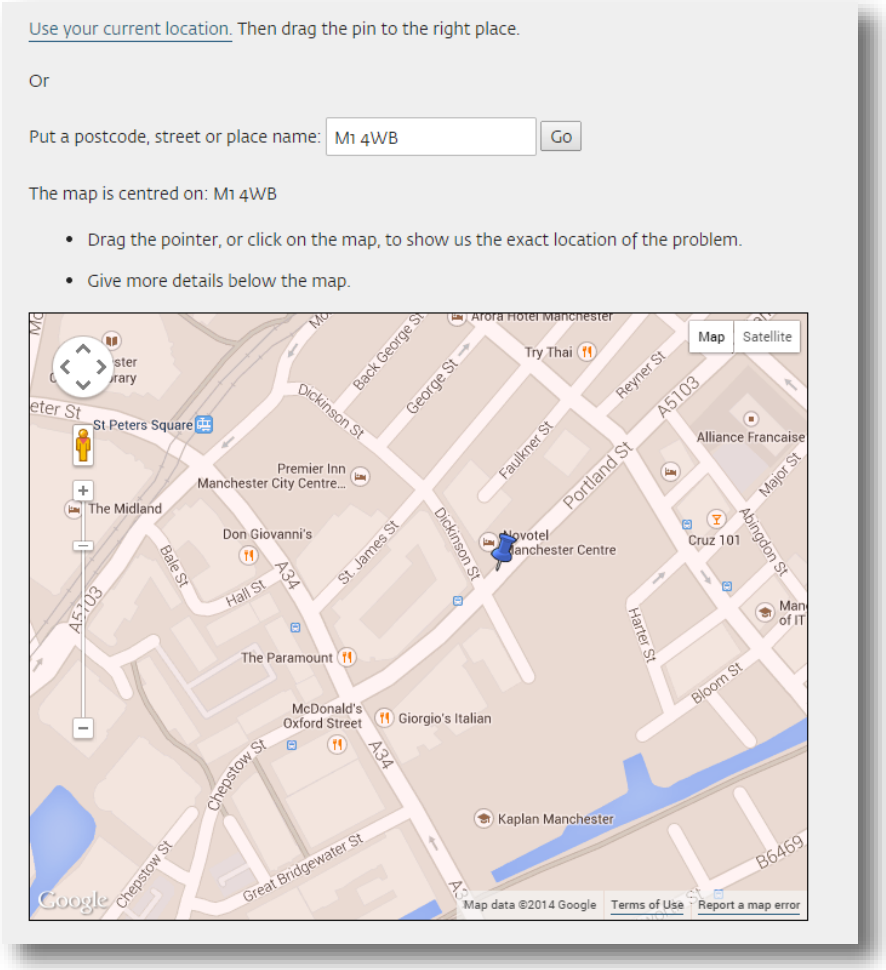

FIGURE 5 - EXAMPLE OF A SIMPLE MAP LOCATION SELECTOR SOLUTION

2.7 POSTCODE FINDER

Postcode look-up should accept entries with and without spaces, and address fields should be auto hidden to reduce the amount of fields shown to the user unnecessarily. There should also be a link directly next to, or under, the 'find my address' button called ‘enter address manually’. Clicking this should display the necessary fields. Once users have entered their postcode and chosen their address, the form fields should be auto populated to confirm their chosen address.

2.8 DATE PICKER

A date picker should be implemented with caution, and tested well, on a mobile site. Sometimes pop up calendars on date pickers can display incorrectly on mobile devices. With this in mind, it is our recommendation that the date picker is removed for mobile and replaced by a simple text entry field, featuring a format hint such as dd/mm/yyyy. For the desktop, a format hint should be applied to the label and excessive date selections should be removed.

2.9 PROGRESS INDICATION

Progress trackers are used to guide the user through a number of steps in order to complete a specified process. They are synonymous with conversion and are used as a way of improving usability. Most progress trackers are designed to display the steps from left to right. In most countries, people read from left to right, so it makes sense that progress trackers follow that pattern.

Always include something that informs the user that they are performing a multi-step process. In the below example you will see numbered icons giving an "at a glance" indication of how many steps are in the process. In addition red and green colour along with success icons have been used to clearly indicate the progress achieved.

FIGURE 6 - EXAMPLE OF PROGRESS INDICATOR

2.10 CONTEXTUAL HELP

Use a help icon next to an input field that the user can click on (when necessary) to request help or further information. It could be used to explain questions such as "Why credit card data is being requested?" "How a birth date will be used?" or to give further clarification as to what information is required. Make it succinct and easy to read. Also, make sure that a user can tab through these help icons to aid accessibility and screen readers.

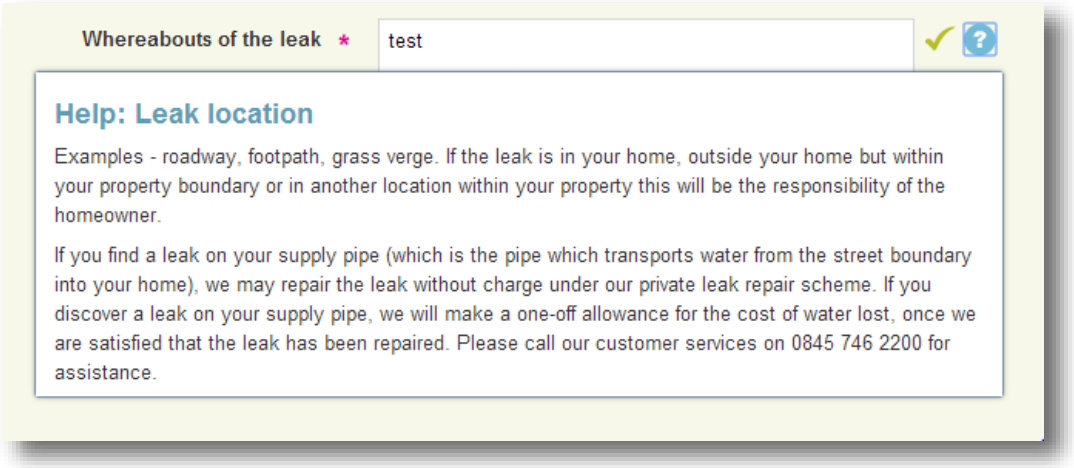

FIGURE 7 - CONTEXTUAL HELP EXAMPLE

2.11 INCORRECT USE OF FORM FIELDS

Provide the appropriate type of input field based on what is being requested. Each type of input field has its own characteristics, which users are accustomed to. For instance, use radio buttons if only one option of several is permitted, and check boxes if multiple choices are allowed. Important address capture should not be provided by free text entry but aided by postcode look up solutions.

2.12 RESPONSIVE DESIGN

Filling in forms on mobile devices can quite often be a frustrating user experience, from form fields being too small for fingers, to having to zoom in and zoom out to read form labels.

Forms must be as simple as possible for users and reduce any unnecessary barriers or repetitions to due to errors. Below are some best practice guidelines for mobile form design:

- Aligning labels vertically
    - Horizontal label alignment should be avoided as in order to fit a label beside a form field you have to reduce the size of both elements. This causes the design to appear cluttered and makes the fields difficult to click.
- Use of large fields and call to actions (CTAs)
- Large fields and calls-to-actions greatly improve usability as they are easy to click on without accidentally pressing the wrong page element.
    - CTAs should be at least 44x44 pixels.
    - CTAs should have plenty of white space around them to prevent erroneous clicks.
    - CTAs should use a colour that's distinct from the rest of the page elements.
- Use of Geo location
    - If the form requires the user's location, such as reporting a pot hole or abandoned vehicle, then using GPS to identify a location makes the process incredibly simple.
- Avoiding optional fields
    - The best practice for mobile form design is to strip out any unnecessary elements and simplify the process for users. Therefore it's good practice to remove optional fields. Unless it's compulsory the chances are they won't fill it in anyway.
- Condense the process into a single page where possible
    - Users have natural concerns that a form is going to take ages to fill in – therefore, a single page design combined with removing optional fields helps to alleviate this concern.
    - If it's not possible to reduce a form to one screen then a step process bar should be used. This will inform users how many steps they are going to have to click through.
- Passwords
    - Passwords should be masked to aid security, however this does cause problems as the user maybe unsure if they've managed to press the correct keys. Good practice

for a mobile device is to give users a checkbox option to show the password in order to check it's correct.