

WEB FORM GUIDELINES

The primary goal of our web forms is getting people through them quickly and easily.

Through basic principles and common patterns, we provide a framework for consistent and usable web forms.

On making decisions...

Not all options and decisions can be identified in a simple diagram such as this. If you need assistance, consider the following:

- Visual design decisions should be guided by the visual style of the template in which the form is displayed. If you are unsure of what choices to make, please consult the visual designer.
- Interaction and information design decisions should be guided by the guidelines identified here and by referencing the book from which these guidelines were developed:

Web Form Design: Filling in the Blanks Luke Wroblewski | Rosenfeld Media
If you still have questions (or would like a look at the book), please contact: fhoffman@uvic.ca

CONTENT ORGANIZATION

Organize the questions into logical content groups to aid scanning and completion.

Distinguish between groups

Visually identify or differentiate between each content group:

- Space
- Subtle background colours
- Bounding boxes
- Borders



Aboriginal identity

Do you identify yourself as an Aboriginal person; that is, First Nations, Metis or Inuit?

Yes No

If you identify yourself as an Aboriginal person, are you:

First Nations
 Metis
 Inuit

Full-time study

Do you intend to study full time?

Yes No

PATH TO COMPLETION

Clear naming

Through logical form names, users will understand what form they are on and what they will accomplish by completing it. Use a form name which matches the call-to-action that users are familiar with.

Clear scan lines

Providing a clear scan line (or path) from start to finish will allow users to respond quickly to questions and complete the form with few distractions.

Provide a clear scan line through strong vertical axis of:

- Labels
- Input fields
- Primary action button

Reduce distraction

Keeping interface elements to those only directly related to completing the form helps keep users moving and reduces chances of form abandonment.



Request an email address

Send us your feedback

Submit a work order

Language and citizenship

Primary language

Country of birth

Country of citizenship

Address

Street address

Province

LABELS

Language

Use succinct, natural language and consistent capitalization.

Alignment

Top-aligned labels tend to reduce form completion times because they are in close proximity to their input fields. Top aligning moves users in a downward direction.



Personal information

Date of birth

[OR]

Personal Education Number (PEN)

Canadian Social Insurance Number (SIN)

A SIN must consist of 9 numbers

INPUT FIELDS

Types

Select the right input field for a specific interaction. Does it require a yes or no answer; a selection from mutually exclusive options; etc.?

Alignment

Left-justify labels beside radio buttons and check boxes so they are in close proximity to the control.

Text boxes

Allow users to enter any number of characters into single or multiple lines.

Enter Text
Enter More Text

Radio buttons

Allow users to select one choice from two or more always visible and mutually exclusive options.

Yes
 No
 Maybe so

Check boxes

Allow users to select any number of choices from a list of one or more options.

Apples
 Oranges
 Cantaloupes

Drop-down menus

Allow users to select exactly one choice from two or more mutually exclusive choices

List boxes

Allows users to select exactly one choice from a set of mutually exclusive options or multiple selections.

Donkeys
Orangutans
Squirrels
Bunnies
Deer

Required fields

Indicate required fields next to labels so users have a way to scan the form quickly and determine which questions require an answer.

- The * symbol is used because it is relatively well understood to mean required.
- Include a legend which explains what the * means.
- Try to avoid optional input fields to make it easier for users to complete the form quickly.

Field lengths

The length of the field should be a consistent length where possible, and provide enough room for a complete answer.



* Indicates required fields

Telephone number *

North American

- Extension:

International

Email address

Email address *

Re-enter email address *

ACTIONS

Primary actions

A web form enables one or more final actions such as Submit, Save or Continue. These are the primary goal of the user when they are filling out the form.

Secondary actions

Secondary actions tend to be less used and allow users to retract the data they've entered, such as Cancel, Reset or Go back.

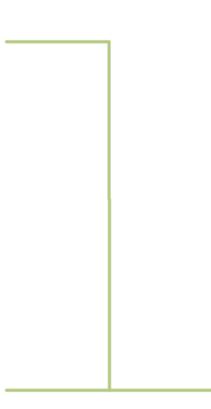
Because secondary actions can have negative effects, their use should be limited and visual prominence should be reduced in relation to the primary actions.

Distinction can be accomplished through:

- Different button styles
- Combination of buttons and links
- Different link styles

Placement

Left-align actions with the input fields and labels above them. This is a common expectation among users and aligns with the Clear Path principle.



Delivery information

* Indicates required fields

Billing address

Street address *

City or town *

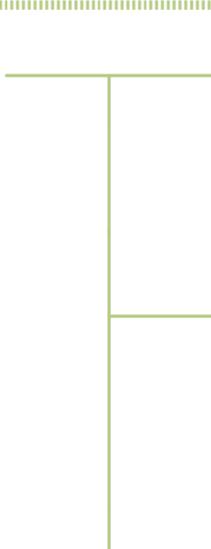
Country or region *

Postal code *

HELP

Help text is a set of messages which help users complete the form successfully. However, excessive help text may indicate that your form is poorly worded or designed. Help text can also be a problem because users tend to avoid reading instructions.

- Help text is best for explaining unfamiliar questions. Consider the context and primary users of the form.
- Help text should be concise, adjacent to the question being asked and in a style distinct from field labels
- Help text within input fields should only be used to provide recommended ways of answering questions.
- If the form is asking questions which users may be unsure of how or why to answer, consider using an automatic inline help system.
- If the form is asking unfamiliar or complex questions, and is likely to be reused by the same people multiple times, consider using a user-activated help system (such as on-click or roll-over messages pop-up) with triggers placed next to labels.
- If you have a lot of help text, consider using a help section



Learn more about Facebook login

Using your Facebook account to login into [Application] allows you to do the following:

- remember one less password
- publish [content] to your Facebook wall

[Application] will not access your Facebook account without prior authorization. Note that at any time, you can disconnect your [Application] and Facebook accounts from within Facebook's Account Settings page.

Log in

Recommended [Learn more](#) [OR] [Help](#)

Your account | Help

User name

At least 6 characters

Password

Forgot your password

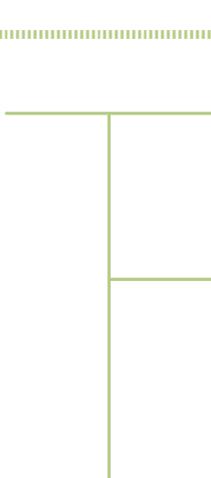
Remember me [?](#)

When you log in you accept our [terms of use and privacy policy](#).

AGREE AND SUBMIT

Some forms require the user to agree to or beware of conditions governing their submission such as a Privacy Policy or Terms & Conditions.

- The common approach is to separate the agreement from the form submission: a checkbox for agreement and a button for completion.
- If there is an opportunity, you may choose to combine agreement with submission.
- If no agreement is required, rather simply awareness is needed, placement of the agreement should not interfere with primary actions.
- The agreement text itself should be presented in a manner which does not interfere with or remove the user from the completion of the form. This could be implemented using:
 - Inline expand function
 - Display in a constrained pop-up window
 - Display in a new window/tab.



I agree to the Terms and Conditions

By clicking on the Agree & Submit button below, I agree to the Privacy Policy

When you log in you accept our [terms of use and privacy policy](#).

ERRORS AND SUCCESSES

Error messages

Error messages let users know what happened when an error is made and are the most important element on a form when present and need to be presented as such.

- Clearly identify the input field(s) responsible for an error.
- Provide clear resolution options so they can be resolved immediately.
- Visually associate responsible input fields with a top-level error message to let users know what they need to resolve.
- Reserve red text and warning icons for error messages.
- On short forms, you may choose not to display the top-level error message or indication of responsible input fields, but not both.

Writing error messages

Error messaging is a critical component of user support. Error messages should be concise, friendly and knowledgeable. They should not blame the user for creating a problem.

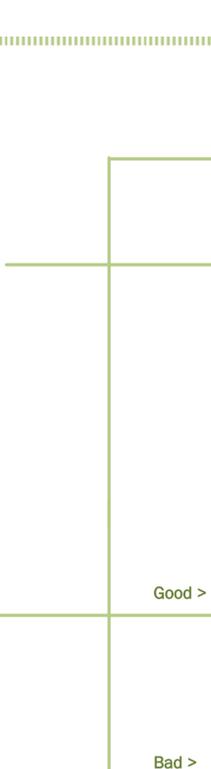
- Alert the user to the specific problem with an appropriate level of seriousness ("A serious error has occurred!" is rarely necessary)
- Provide some specific indication as to how the problem may be solved
- Suggest where the user may obtain further help
- Should not suggest an action that will fail to solve the problem and thus waste the customer's time
- Should not contain information that is unhelpful, redundant, incomplete, or inaccurate

Success messages

Success messages let users know they've accomplished the goal of completing the form.

A success message successfully completed and a form has been submitted and submitted.

- Provide success messages in context so the user can move ahead without being blocked (replace the form with the success message unless)
- Use visual distinctions to differentiate success messages from page elements, including error messages
- Success messages can include useful related actions for the user to take upon submission of the form (avoid dead ends).



Personal information

Incomplete submission
All required fields must be complete.
Missing: Social Insurance Number

* Indicates required fields

Canadian Social Insurance Number (SIN)

Please enter a valid SIN containing numbers.

File and folder rename cannot be completed

"Pictures" cannot be renamed because a file or folder with that name already exists.

Please specify a different name.

Internal Server Error

A serious error has occurred. The server encountered an internal error or misconfiguration and was unable to complete your request.

Please contact the server administrator and inform them of the time the error occurred, and anything you might have done that may have caused the error.

Contact information sent

Thank you for submitting your contact information.

Send us your next of kin information
Tell us what you think of the contact information form

MORE INFORMATION

These guidelines are just the tip of the iceberg in terms of creating successful forms. For more information, we suggest you invest in the following book, available in paperback and online versions:

Web Form Design: Filling in the Blanks
Luke Wroblewski | Rosenfeld Media,
2008; version 1.0



University Systems