Forms Design Best Practice

Front Office

Tips to help you design better forms

1.0   Getting the best out of the forms' designer

1.1   Consistent Styling

Having a set of forms using a consistent styling can add a feeling of quality.

Spend time on the first form of a batch and even have a draft form to act as the template /master. Use the clipboard facility to copy form sections over to new forms to save time whilst providing that consistent look.

1.2   Make Use of Sections

Sections are useful not only to group fields but also to hold headings.

Sections allow the form to be split into logical areas allowing users to more easily complete / read.

Sections are also useful for visibility rules, with one rule targeting a section controlling the visibility of all child fields as well. Remember to give them sensible field codes to help identify when reviewing rules and role privileges.

1.3   Better Looking Images

Images look much better on a colored background when transparent. GIF's and PNG's support transparency whereas JPG's do not.

If the image on the form needs to be resized, ensure the aspect ratio is retained: the image properties popup (from the HTML toolbar) allows linkage of width & height when resizing.
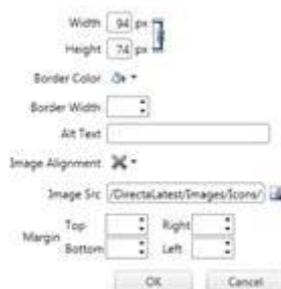
1.4 Center Heading Images

Centering headings cannot be done with the built-in HTML control toolbar however a bit of HTML editing can give the desired effect:

```
<table style="width: 800px; height: 86px;">
    <tbody>
        <tr>
            <td>
            <p><img alt="" style="border-color: #c00000; margin-right: auto; margin-left: auto;
display: block;" src="/FrontOffice/UploadedImages/employees.png" /></p>
            </td>
        </tr>
    </tbody>
</table>
```


1.5 Gradient Filled Heading with Overlay Text

With a thin repeating gradient image, the whole header can look like it merges into the form; avoid rounded corners with this technique. Use it as a background color within a table to allow overlaid text:

```
<table style="width: 957px; height: 80px;">
    <tbody>
        <tr>
            <td style="background: url('/FrontOffice/UploadedImages/grad.png') repeat-x; text-
align: center; vertical-align: middle;">
            <b><span style="color: #0f243e; font-size: 16px;"><em>Title Here</em></span></b>
            </td>
        </tr>
    </tbody>
</table>
```

1.6 Field Width Control

The control width is the width of the space to the right of the label and within the confines of the containing section. The smaller the label the greater the control width available.

These control widths are absolute pixels, although they will never exceed the section, or section cell, they sit in.

- Small = 100px
- Medium = 200px
- Large = 300px
- In Pixels

These are always variable, dependent on the width available; as the screen is resized the fields resize:

- Fill = always 100%
- Percentage

Be aware of the typical screen resolution of a user viewing the form as this could affect how the form looks and could especially dictate the maximum number of columns that can be used in sections.

1.7 'Floating' Sections

Having the sections not hug the edges of the page but still size according to available space is a pleasing effect, especially when using drop shadow. Give sections a percentage width e.g. 90% and center justify.
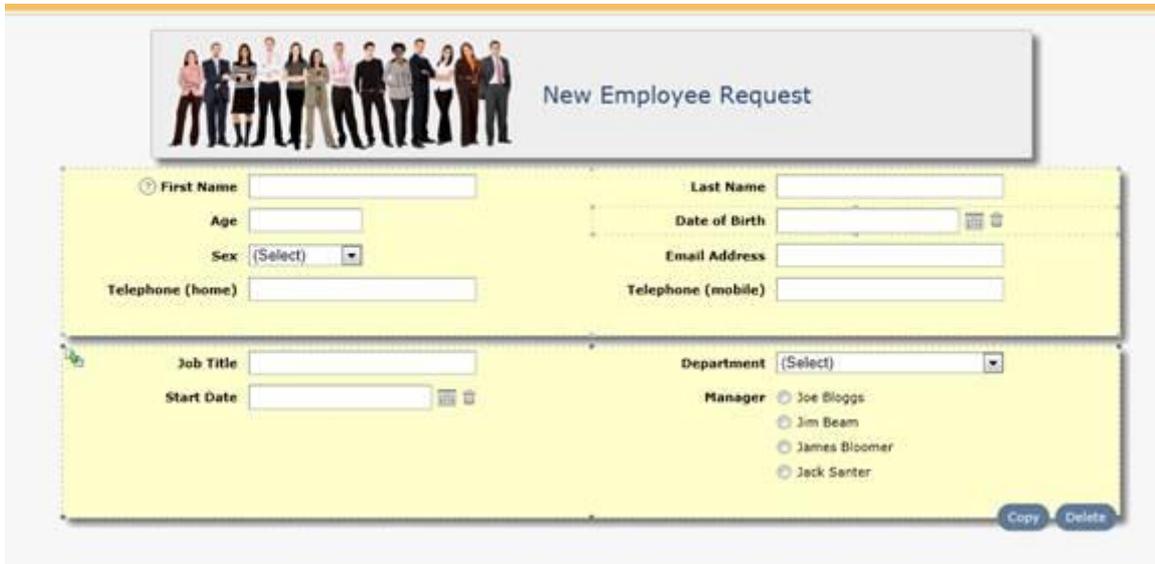
1.8 Use Headings as Labels

Headings can be used throughout the form as additional labels or prompts to augment field help.

Having them as separate field allows conditional showing via rules and hooks; ensure they are given a sensible field code.

1.9   Color Matching

Getting the colors exactly right can add a touch of class. On the field Background Color, use the color picker RGB Slider to select the correct color exactly.

If trying to matching a color from another site or image, take a screen shot and load into an image editor, then use a color picker control to determine the color in use. Enter the same RGB values in Front Office.

1.10 Label Positioning and Size

Top aligned labels can be useful, especially where additional entry space is desired:

Right/Left aligned labels take space away from the entry area of the field but can have their width and alignment adjusted.

2.0 General 'best practice' tips

The following tips are from the book *Forms that work: Designing Web Forms for Usability* by Caroline Jarrett and Gerry Gaffney.

2.1 Include a title that states the form's purpose

It is reassuring for users to see a title that reflects the purpose of the form, although try to avoid titles with the word 'Form' in them. Consider the following examples:

Form Title	Comments
Request a new starter	Good! – an affirmative, clear statement
New starter request	Neutral
New starter	Bad! – what am I going to do now?
Form 13	Very Bad! – what is this?

2.2 Use typographic variations with restraint

You **MAY** be tempted to use **bold**, *italic*, and CAPITALS and underlining to emphasize **IMPORTANT INFORMATION**. Problem: you can END UP with a sort of VISUAL SOUP where **none** of the **emphasis works**.

(The same goes for color)

2.3 Use short, affirmative, active sentences

"Short" sentences are up to 20 words long.

"Affirmative" sentences are positive rather than not negative.

"Active" sentences are phrased in the active voice: it's clear who is doing what.

Consider the following examples:

The customer must fill out the form	Good! - Active Sentence
The form must be filled out by the customer	Bad! - Passive Sentence
The form must be filled out	Very Bad! – Passive sentence that does not say who is doing the action

2.4   Sentence or title case for labels?

Sentence case is more legible than title case:

Sentence Case:	Number we can use to contact you	Good!
Title case:	Number We Can Use to Contact You	
Every word in capitals:	Number We Can Use To Contact You	

2.5   Choosing controls (i.e. text box versus list-box / radio button)

Think about the end user's expectations of how the controls work:

- If typing the answer is more natural, then go for a type-in text box.
- If users are likely to make mistakes when typing, only then opt for a list-box or radio buttons.
- If there are a lot of options, using a list-box may be best, but could you redesign the question instead?
- If there are a few set options, a radio button field presents well.
- If the users are able to select more than one option, check boxes are likely to be the best control.
- If the options all look alike, it may be better to let the requester type into a text box instead.

2.6   Serif or sans serif font?

- This serif font is Times New Roman
- This serif font is Palatino
- This sans serif font is Arial
- This sans serif font is Verdana   Best!

Serif fonts are designed for print; they are normally more decorative and struggle to be clear on a 'low pixel' environment. Verdana was specifically designed to present well in a 'low pixel' environment, with more even features that are legible on a computer screen. Verdana is the default font used throughout Front Office.