



## *How to look at a form in a hurry*

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### The challenge: 'tell me now'

- “Please look at this ...” (form, screen, etc)
- Answer required immediately
- We know the ‘right’ answer is testing
- But
  - There isn’t any time
  - There isn’t any budget
  - We’re supposed to be experts anyway
- So, what to do?




# 5 steps for looking at forms

The 30-minute version

*Looking at forms*

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## Step 1: don't look at it

- You only have one chance to see the form like a user
- If you look at the form before you try to use it, you'll interact differently
- Time so far:
  - 1 minute for discussing this point with customer


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## Step 2: write a story

- Also known as a 'persona' (but we don't have time for full persona development)
- The story
  - Who is filling in the form?
  - Why are they doing it?
  - How do they feel about it?
  - What do they expect to happen?
- Are they different from us, right now?
  - If so, how different?
  - Are we confident we really know these people?
- Time so far:
  - 5 minutes





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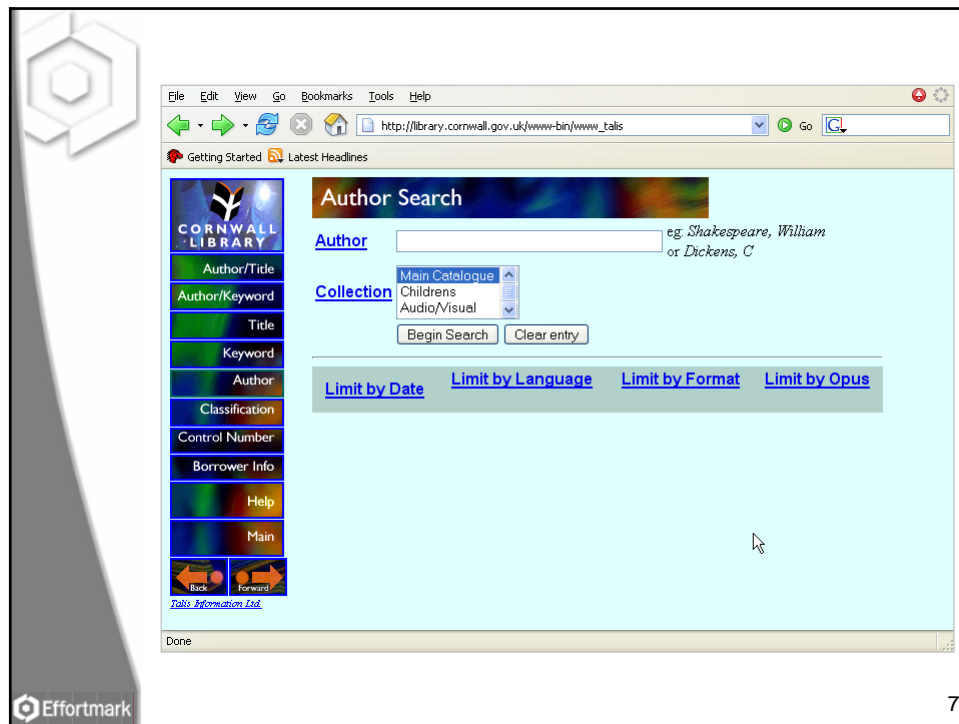


## Try it

- We have to look at a search screen for a library
- Working with your neighbour:
  - Who is filling in the form?
  - Why are they doing it?
  - How do they feel about it?
  - What do they expect to happen?
- Are they different from us, right now?




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### Step 3: fill in the form

- If the form asks for personal information:
  - use your real information (no lies)
  - how does that feel?
- If you have to look up paperwork:
  - go and look it up
  - was it hard to find the things you need?
- If you have to ask someone else for the answer:
  - ask them
  - or think about whether users would really do that
- Time so far: 15 minutes (one-page form)




## Step 4: now look at the form

- Look for relationship problems:
  - What does the user get out of it?
  - What does the business get out of it?
  - Are these in alignment?
- Look for conversation problems:
  - Are the words, sentences, concepts meaningful?
  - Can the user answer the questions?
  - Does the form flow well from topic to topic?
- Look for appearance problems
  - Does it look tidy?
  - Are prompts aligned unambiguously with boxes?
- Allow 10 minutes




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## Step 5: reporting

- We've got 5 minutes left from our budget
- Not enough time to report everything
- Suggestion: pick examples of different types of problems
  - relationship
  - conversation
  - appearance
- Include at least one positive comment
- Aim is to get more time




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# What if you've got more time?

The two-day version


*Looking at forms*



## Get a second opinion


- More people = more insights
- More people = less chance of getting fixated on a minor issue
- For best results: real users





## Look at the competition

- What other forms do your users see?
- Who else asks similar questions?
- Are there any conventions that you should be exploiting?
- How are topics grouped?



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## More comprehensive reporting

- Wider coverage of problems
  - Aim to discuss details of every question
  - Consider some contrasting users
- Think more deeply about problems
  - If the client likes a particular severity scale then use it
  - Another option: estimate number of iterations needed
- Make the report easier to use
  - Include more screenshots / call-outs
  - Edit to focus on most important messages
  - Write a proper management summary





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# Case study


The Oxfordshire Gateway

*Looking at forms*




## Step 1: don't look at it

- Actually, did have to look at it (briefly) to check that the prototype was working
- Tried to avoid more than a glance




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## Step 2: write a story

- Young mother
  - Jenny is 20. She's married with two children under 4. They live on a three-bed semi on a big estate. She likes to get out but it's hard struggling with the double pushchair. She left school after A levels and is now a full-time mum.
  - She used the Web a lot at school, but these days it's mainly for shopping.
  - She doesn't encounter local government services very much, just gets annoyed if the rubbish isn't collected and she's been researching schools as her elder child will soon be starting nursery and she's also thinking ahead to primary school.





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## Try it

- Why is Jenny looking for a government service?



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## Step 3: fill in the form

Oxfordshire Gateway  
to Services in Oxfordshire

Home | Tuesday Jan

Home  
Search  
Show My Local  
Community Info  
A-Z  
Contact Us  
About the Partnership  
About the Gateway  
Site Map  
Access Keys  
Help

**YOUR LOCATION IS NOT SET**

**Welcome**  
The OxWeb Gateway provides all citizens with access to the services provided within Oxfordshire County. Providers of the services include:- Cherwell District Council, Oxford City Council, Oxfordshire County Council, Oxfordshire District Council, Vale of White Horse District Council, West Oxfordshire District Council, Partnership, Thames Valley Police.

**Enter Location**  
Although not mandatory this site encourages you to enter your postcode or the name of the area you live in so we can personalise your experience within the Oxfordshire Gateway and present you with information relevant to you. Once this information is entered you will not need to see this screen again.

Enter your Postcode:  **GO**

Select your Place Name:  **GO**


Enter your Place Name:

## Step 4: now look at the form

- Let's compare our observations

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## Step 5: get a second opinion

- Combined review:
  - both of us
- Recommended usability testing
  - and they did do it
- Recommended accessibility review
  - and they did do it


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## Risks

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## Risks and challenges

- Client becomes over-confident
  - resists doing usability testing
- Consultant becomes over-confident
  - knows less about these users than she thinks she does
- Heuristic methods known to be rather poor at predicting actual problems
- What do you think?

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## What if you've got more time?

The five-day version

*Looking at forms*


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## Luxuries are available

- Run a proper usability test
- Watch staff using the data
  - Typing it in (if paper forms)
  - Retrieving it (for any forms)
- Track a batch of forms through the process
- Look at a sample of data
  - Easy if you have paper forms
  - A bit more challenging for other forms

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## References

- Oxfordshire gateway:  
[www.oxfordshiregateway.co.uk](http://www.oxfordshiregateway.co.uk)  
(report is available on the 'About Us' page)
- Persona-led heuristic inspection:  
[assets.aarp.org/www.aarp.org\\_/articles/research/oww/AARP-50Sites.pdf](http://assets.aarp.org/www.aarp.org_/articles/research/oww/AARP-50Sites.pdf)
- Three-layer model of the form:  
[www.formsthatwork.com/ftp/DesigningUsableForms.pdf](http://www.formsthatwork.com/ftp/DesigningUsableForms.pdf)

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