

Title:

10 Tips when using electronic forms

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Summary:

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Following these ten tips will make sure your new forms are a success.

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Article Body:

Background to electronic forms

You've decided you need electronic forms or have a feeling they should be implemented.

"An electronic form" is a transaction between a user and the form provider. The form can be printed or not.

The most common reasons for using electronic forms are:

1. Cost savings by avoiding re-keying of data
2. Faster customer service resulting in better customer satisfaction
3. Comply with a government or industry regulation.

No tool will turn a bad form into a good one, and automating a bad form simply collects bad data.

Following these ten tips will make sure your new forms are a success.

1. Choose the right approach

Deciding which form format to use depends on what it will be used for.

If your form is very short, such as a two-box login form, then we suggest an HTML form.

You may be required to comply with regulations such as Section 501 or similar where your target audience is government.

PDF forms are likely to be the best approach if:

- There is some advantage to your users in keeping the layout of an existing paper form, such as a form with a lot of text.
- The form previously existed only on paper and now you want to make it electronic.

2. Skills Availability

Creation of an electronic form and its deployment needs specific skills. Most of the time it is not the form designer who creates the form.

Creating an electronic form requires different skills:

- Working with software installation and databases.
- Ability with words and understanding of business processes.
- Ability to design field names, preferably with some knowledge of how the fields will be used.
- Working with field lengths, descriptions and validations.

- Understanding of business processes; ability to find and correct errors; working with word processing software.
- Working with the web.

Most organizations find that they have these skills available but not necessarily in one person. You'll get the best results, quickly, if you identify people with the right skills to work together.

### 3. Check that each form has the basics

Make sure that each form has these essential pieces of information:

- A logo, crest, or something else that identifies who issued the form.
- A title that says what the form is for.
- A note at the end saying what to do with it when it is filled in.
- Contact details for how to get help with the form.

### 4. Adapt the form for on-screen completion

Remove instructions and formatting that is only relevant to paper: For example:

- "write neatly in black ink", or "use CAPITALS".
- "please tick the box" (can't do it on-screen ~ say "please choose" instead).
- "use a separate sheet if more space is needed" (can't do it on-screen ~ consider offering an alternative).
- ruled lines, underlined spaces and boxes.

Think about where to put the SEND or SUBMIT button. The best place is usually at the end of the form.

Decide whether you really need a button that throws away all the user's input. If you think the user will want to go back, use a button that just saves the form.

### 5. Edit the instructions

Most forms have far too many words.

Aim to cut half of them.

### 6. Establish rules for frequent questions

If you're only working with one form then skip this tip.

Most of us have to contend with lots of forms. If you compare a selection of them, you'll find common questions.

For example:

- Personal details such as name, address, telephone and email address.
- Declarations and consents.
- Requests for dates such as the start date of a service.
- Official information such as a reference number from a bill.

Your work will be quicker, and it will be easier for your users, if you establish some standard rules.

- Decide on the order that you ask for names e.g. title, first name and last name.
- Decide whether to ask for an address in a single multi-line block or whether to split it up
- Decide whether to ask for the postcode first (and consider using an address lookup product)
- Decide if you need a portal model of personalization for forms whereby the user gets a pre-filled form
- Cut your declaration to the absolute minimum that your lawyers will agree to, and then use it
- Work out how many characters you will accept in standard questions such as names. These will

It saves time if you make a 'template' form that has the basic information and your most frequent questions.

## 7. Manage the forms in their life cycle

Forms can change over a period of time due to various reasons. It can be a legal reason, usability or a change in business requirements.

Make sure you have a simple to use strategy to manage the versions of each form published.

## 8. Think about the business reasons for validation

There are three possible levels of validation:

- Strict - the computer will not allow the user to proceed until correct data is entered.
- Soft - the computer warns the user that the data is missing or incorrect, but the user can proceed.
- None - there is no warning and the computer accepts any input.

Think about the business reasons for each validation. Paper forms allow users to enter whatever they want.

If you have strict validation, then you may lose some users whose circumstances are a little different.

Soft validations are the most challenging to program, but can deliver the best user experience.

Opting for no validation is the easiest to program, but may confuse your users if they inadvertently enter incorrect data.

## 9. Tidy it up

Forms that look tidy are easier to fill in.

Check that you have used capitals consistently. Sentence case (like this) is easiest to read.

If you decide to put colons after your questions, then make sure that you have them for every question.

Try to make all the boxes line up neatly, both horizontally (in line with the questions) and vertically.

Run a spell checker and a grammar checker.

## 10. Test it with real users

Ask some real users from the target audience to try your form. Watch them as they fill it in, and take notes.

Watching a real user work on your form is the single best way of finding out whether it is successful.

For detailed information on electronic forms and their implementation, visit <http://www.primea.com>

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