Webform Best Practices

Purpose: To provide the Digital Commons community with best practices when managing and creating webforms.

Pre-planning

Turning a paper form into an online form can take some thought. Do the following to plan out the new form:

- Meet with the client/business owner to understand their goals of the form.
- Identify which fields are required and which are optional.
- Are there fields that only need responses in certain circumstances? Understand the logic of when the field(s) are needed, and apply conditional logic to a portion of the form. For example, if the answer to a question is yes, then the user will be presented with more fields.
- Work with the client to create a sketch of how the webform will look. Include any potential areas where logic can be used. See the sketch below.

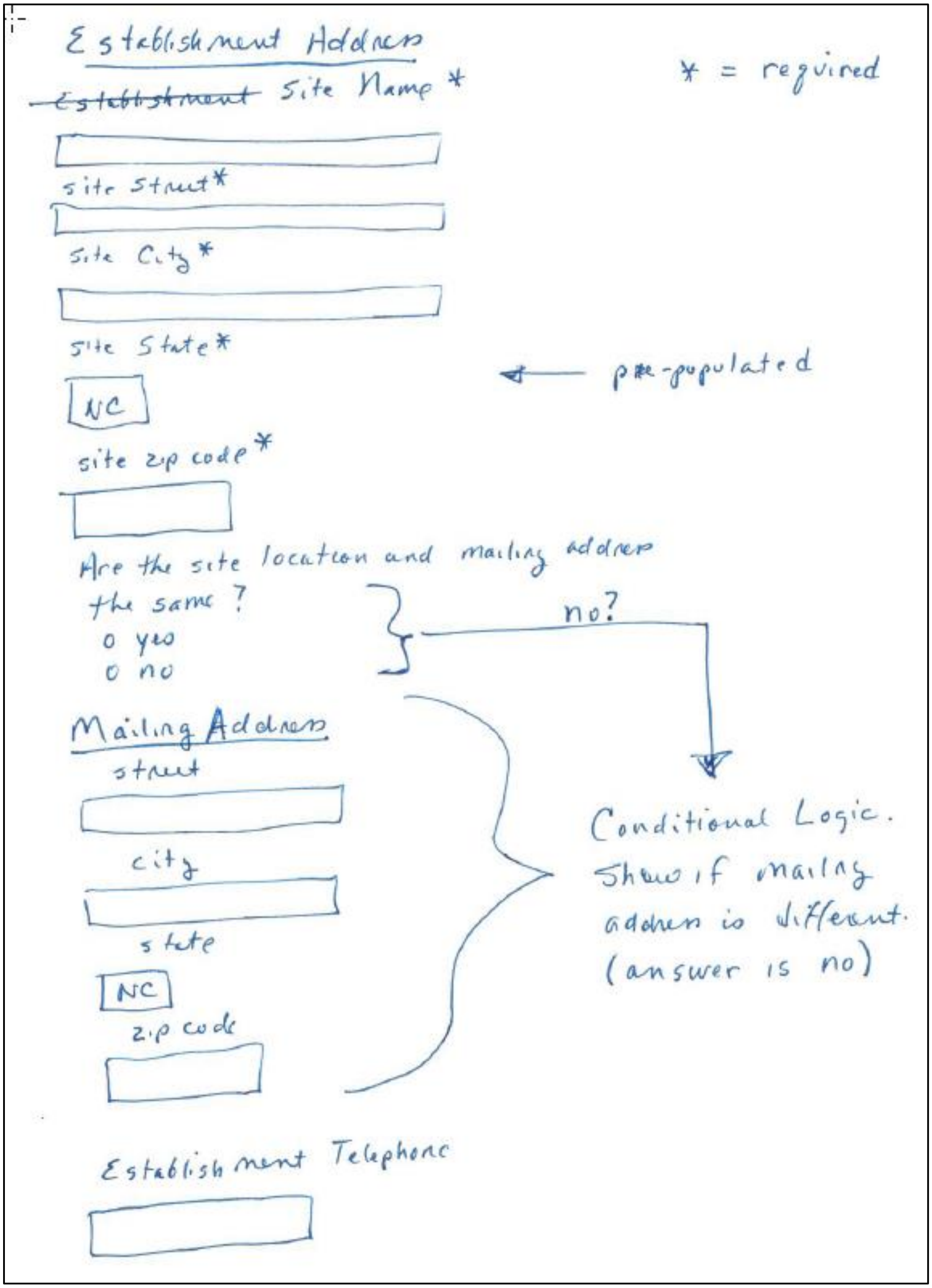
Use of Description and Placeholder Text

Use as few words as necessary in the form. Explanation is often counter-productive; the site visitor will scan instead of reading. Short field labels and short instructions will carry more weight than a paragraph of helpful tips.

Capitalize field labels the same as you would a heading: Mailing Address not Mailing address

Ideally, the form field label is clear enough to tell the site visitor what information is desired. Example: *First Name* or *Last Name*. If the site visitor needs more information than the simple form field label:

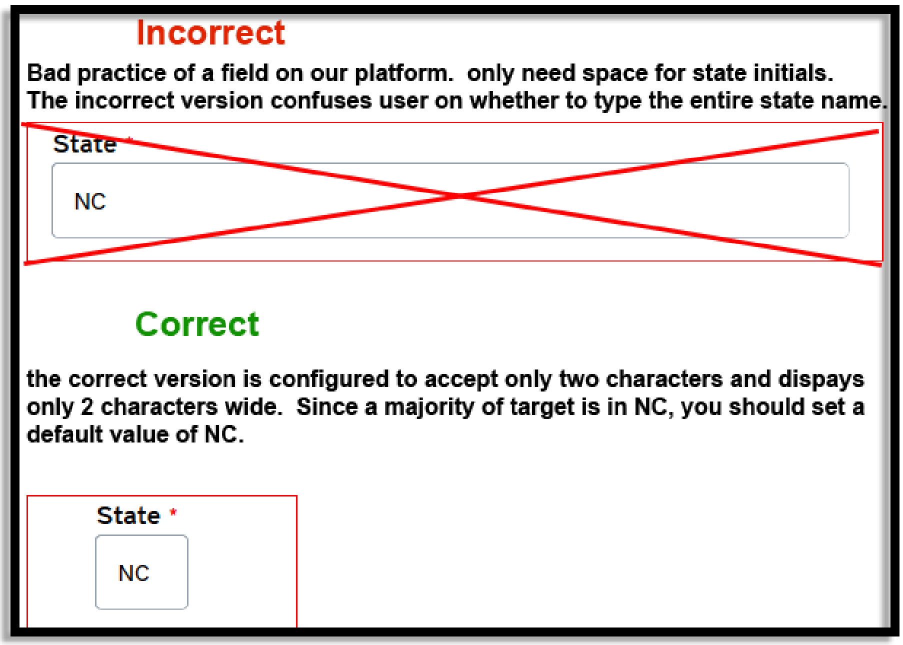
- First, consider using placeholder text. This provides an example of a field entry as "ghost" text. Placeholder text for email might be "example@email.com". As soon as the site visitor clicks in the box, the placeholder text goes away. Use placeholder text when the site visitor might be confused about what information is needed, or what format to use.
- As a last resort, use the description field. Employ as few words as possible to explain what information is being requested. Use sentence case capitalization (capitalize the first word.) Choose the option to show the description above the field, not below.


Establishment Address
~~Establishment~~ Site Name *
* = required
site street*
Site City*
Site State*
NC
pre-populated
site zip code*
Are the site location and mailing address the same ?
o yes
o no
no?
Mailing Address
street
city
state
NC
zip code
Conditional Logic. Show if mailing address is different. (answer is no)
Establishment Telephone

Communicate What You Want through Size

Use the field length as a clue for how much information to provide.

- Use ***textfield*** type for one-line responses, such as name or address. You can specify the number of characters to your benefit, such as allowing only 5 characters for zip code.
- For longer responses, perhaps a sentence or more, use the ***textarea*** type. Provide sufficient space/character numbers for an appropriate response.



Select Options

Radio Buttons

The default view in Select Options are radio buttons, which are all visible and only allow a single selection. Use this view if there are under 5 or fewer items

List Box (Drop Down)

Use this option if there are more than 6 choices. List box puts the selections in a dropdown. Be aware that “select multiple” does not work with List Box.

To convert the default radio buttons to select drop down, place a check mark in the Listbox, under Display.

Enter meaningful text for the “empty option”, such as “Select a Location” or “Choose a County.” If you leave this empty, the default   language is None.

Multiple Options (Checkboxes)

Checkboxes allow you to check multiple options because they are all relevant to the question. Usually there is a checkbox for "other", with an accompanying textfield that is hidden by default. Use conditional logic to hide the textfield so the user will not assume that the textfield needs to be completed.

To convert the default radio buttons to Checkboxes, check the “Multiple” field , the radio buttons will become checkboxes. Be sure to add a description that says “Choose all that apply.”
Note: If you unable to display the checkboxes, make sure you uncheck the Listbox.

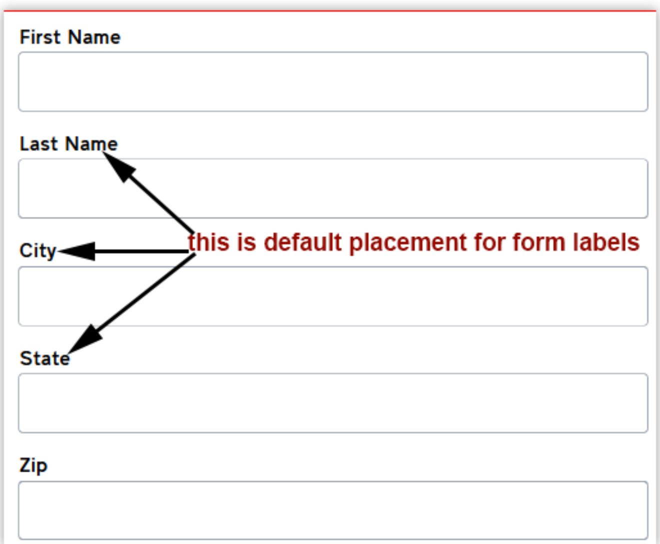
Make Button Text and Other Call to Actions Descriptive

Submit is generic button text, but usually you can be more descriptive. For example:

- If the form is to sign up to receive a newsletter, button text should say “Sign Up.”
- If the form is to register for an event, button text should say “Register.”
- If the form is to request a certificate, button text should say “Request Certificate.”

Form Flow

The best practice is for form fields to align in a single column and labels to be aligned in the top left and bolded. These are default behaviors in our platform.



- Ask the questions logically. For example, you normally ask for the user for their full name before their contact information.
- Use logic to hide fields and make your webform easier for the user. For example, after a physical address is provided, ask whether the mailing and physical address are the same. If the answer is NO, present the user with conditional fields for Mailing Address.

Grouping

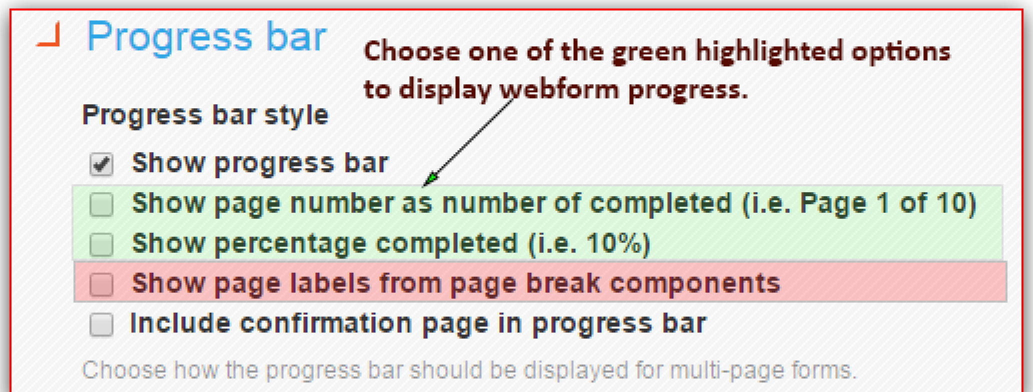
Group information together when possible so the form is more intuitive for the user.

- Use headings to show the user what content is related. Select a type of ***Markup*** to add a heading in a text editor.
- You can also group logical items in a fieldset. For example, place the name and contact information in the same field set. This provides a way for the user to quickly scan the types of information being requested.

Multi-Page Forms

There is no hard and fast rule for how many fields require a form to be paginated. When you do split it up, use logical sections. Don't split up fields that go together, such as city and state in an address.

Use a progress bar at the top for multi-page forms, to provide the **user with a visual que to their progress. To do this, check the Show progress bar along with the Show page number as number of completed (i.e. Page 1 of 10)** or **Show percentage completed (i.e. 10**%) options. These options provide the user visual cues of their progress. Be careful when using the **Show page labels from page break components** options. Long labels will break causing your progress bar to look broken.



Be aware that our platform does not provide inline validation. If the user omits a required field, or inputs invalid data, the form will not be submitted, with the error message at the top. This is one reason to paginate long forms.

How to Present Common Fields

Certain fields show up on almost every form. We do our site visitors a favor if these are predictably presented.

Name Field

Minimum, have separate fields for first and last.

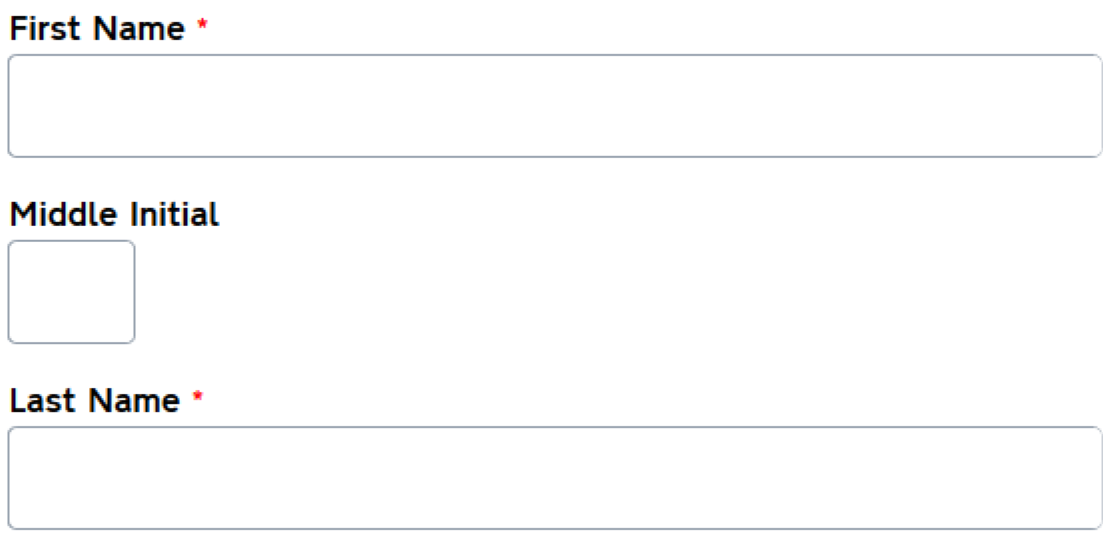
Use the default width for first and last names.

Add-ons could be middle name or middle initial, title, and/or suffix.

Don't add placeholder text or descriptions. These fields are self-explanatory.

If a middle initial is being requested, make the field one character long.

Example



Address Field

Street Address

- Use separate text box fields for street address 1, street address 2, city, and zip.
- Street address and city should be the default size
- Two street address fields, numbered 1 and 2. Secondary street address should be optional; never make it required.

City

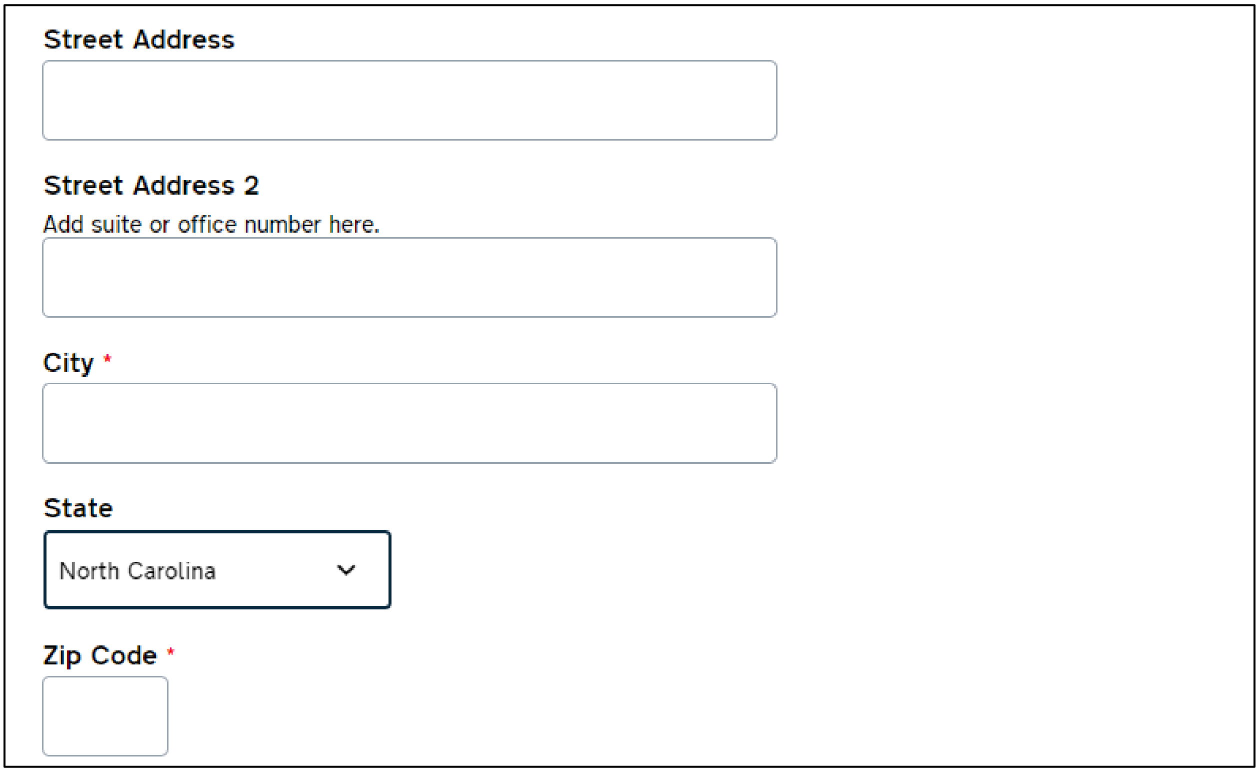
- Text field, default size.

State

- Use the Select Options field type for the State.
- Use the listbox option in this field type.
- In the default value field, type "NC" to make North Carolina show for the site visitor. They still have the option to select another state.

Zip Code

- Field should be 5 characters long.



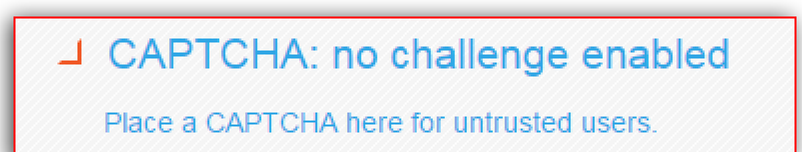
If both a street address and a mailing address are needed, show the fields for street address, and hide those for mailing address. Use a select box to ask whether the mailing address is the same as the street address, and only show the mailing address fields with a **no** response.

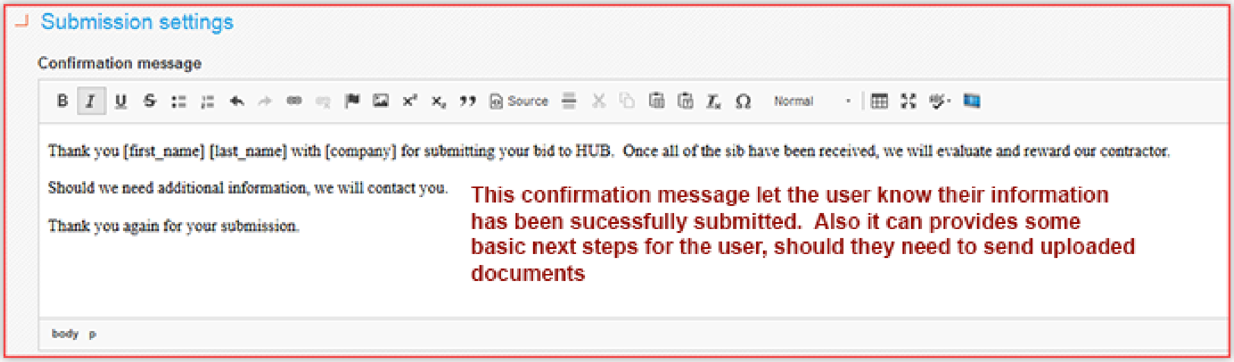
Email

Always use the email field type to gather email addresses, never a text box. This field type allows validation. This field should be required if the site visitor needs a copy of their submission data.

Deter spam

Ensure you have Captcha enabled on the webform. This will help with deterring unwanted spam. For multi-step forms make sure you configure the form so that it only needs to validate from the first page.





Configurations that should always be in place on webforms

You can allay user anxiety by providing them with a preview of their submission, and by assuring them that their information has been received.

- **Preview page** - On long forms or multi-step forms, include the preview page. It will allow the user to review their answers prior to submitting. With a multi-step form, the answers from each page is saved so the user will not have to reenter information for a second time.
- **Form settings** - under the Submissions Settings header, create an on-screen message to indicate that the user has completed the webform. “Your submission was successful." This is an appropriate place to add any instructions they need for next steps.
- **Emails -** make sure someone from the agency is designated to receive the email submissions to ensure there is no additional follow-up is needed. Create a second email so the recipient will receive a copy of their results, which serves as a verification that the information was submitted.
    - **Under the E-**mail template, place a checkmark next to **Send e-mail as HTML**. This is important because it will display all the customer information in a more readable format.
- **Advanced settings:** Select “Automatically save as draft between pages and when there are validation errors.”