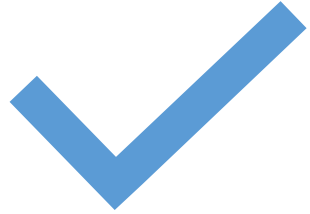


Adaptive Form Design Guidelines

Presented by Eric Stevens

Three C's of Adaptive Form Creation



Clear



Consistent



Consumer

Navigation

Clear

- There should be no guessing on how to move through the adaptive form

Consistent

- Process should remain the same within the same form

Consumer

- What is the typical journey for the users



Defining Navigation For an Adaptive Form



Journey

Understand the specific journeys for the users of the form



Data

Leverage data and built in intelligence to reveal the users specific path



Control

Control the flow based on the specific journey requirements



Simplify

Users should not be confused with where or what they are supposed to do

Layout

Clear

- Limit number of fields on the screen
- Avoid scrolling

Consistent

- Similar forms should leverage the same layout

Consumer

- Which devices do users' typical use



Stock Panel Layouts

| Panel Layout | When to use | When to avoid |
|------------------|---|--|
| Tabs on the left | <ul style="list-style-type: none">• 5 or more main section | Tab titles are very long |
| Tabs on the top | <ul style="list-style-type: none">• 4 or less main sections | There are sub sections to your content |
| Wizard | <ul style="list-style-type: none">• Structured path that must be completed before advancing | Users need to be able to move around through the application |
| Accordion | <ul style="list-style-type: none">• Streamlining large amounts of informational content | Content needs to be seen by the user |
| Responsive | <ul style="list-style-type: none">• Grouping field elements | Main source or navigation for your form |

Journey

Clear

- Simplify wherever possible

Consistent

- Leverage similar layouts for familiarity

Consumer

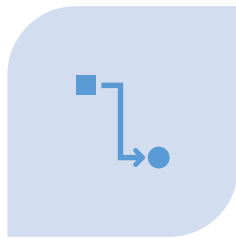
- Streamline what is required for the users



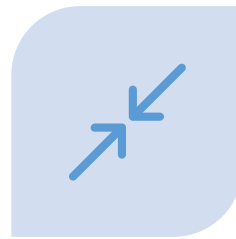
Craft The Best Experiences



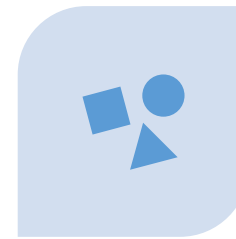
**PREFILL
INFORMATION**



**DON'T ASK FOR
INFORMATION
MORE THAN ONCE**



**REDUCE THE
AMOUNT OF FIELDS**



**USE THE
APPROPRIATE
ELEMENT TYPES**



**ADD HELP WHEN
NEEDED**

Styling

Clear

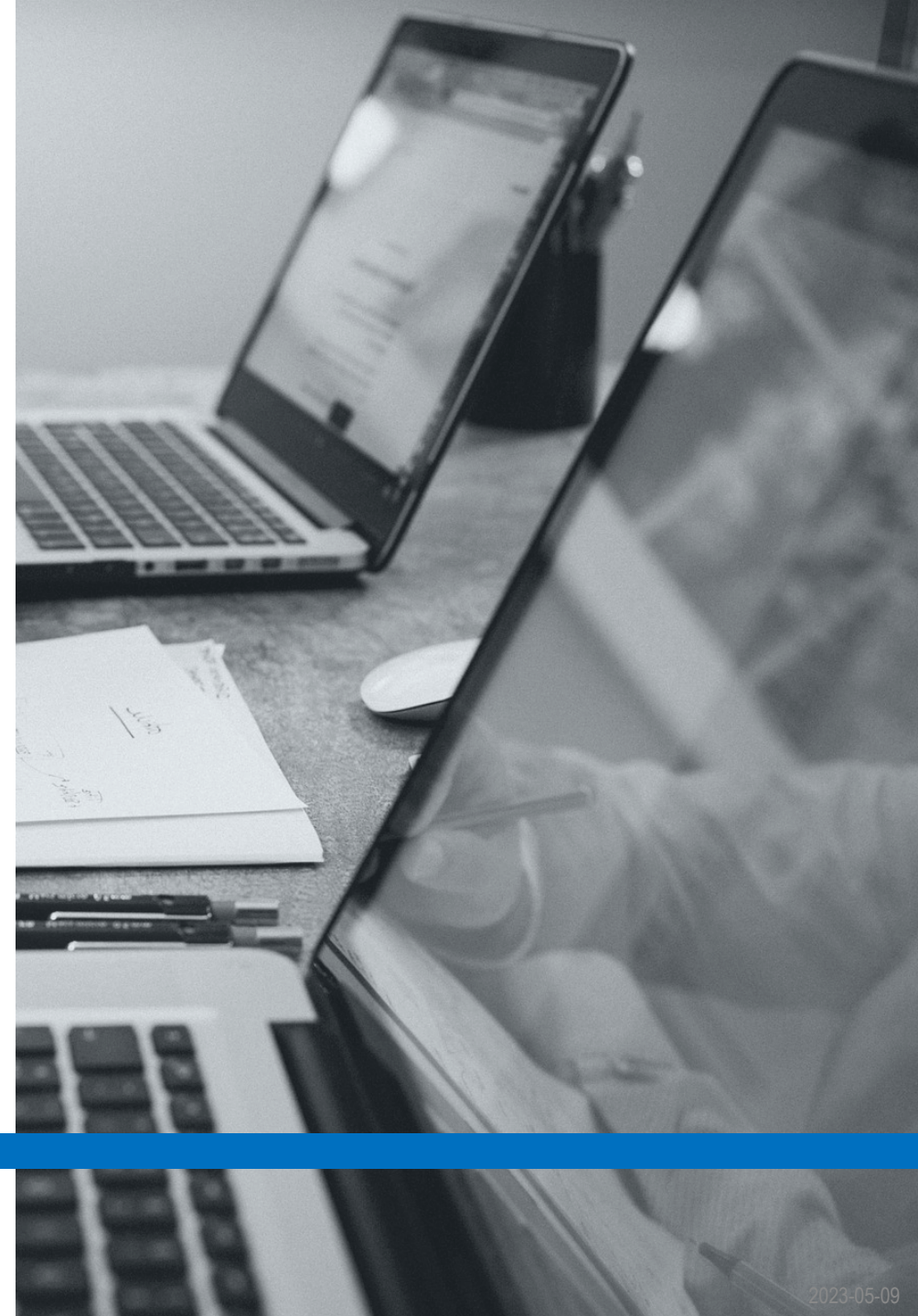
- Styles should not detract from the journey

Consistent

- Establish a specific look and feel to be used throughout all your form

Consumer

- Use styles to help portray information to users



Understanding Adaptive Form Styles

Themes

Should be used as your main source of styling rules

External CSS

Should be used when custom components are created

Inline CSS

Should be avoided



Reusability

Clear

- Understand what sections are common throughout a single form and across multiple forms in your organization

Consistent

- Leverage logic and data to add intelligence into your forms for more consistency throughout

Consumer

- Utilize data to simplify the data capture portion for end users



Modular Structure of Adobe Experience Manager

Templates

- The base for any new form
- Includes items that exist on all forms of this type
 - Headers & Footers
 - Column layouts

Themes

- The Branding guide that tells a form how to look
 - Colors
 - Element Appearances
 - Font Face

Fragments

- Designer defined grouping of elements, or text that is commonly reused

Accessibility

Clear

- Specify what the screen reader will read

Consistent

- Persistent logic and layouts add predictability to forms

Consumer

- Understand how you can design forms for people with disabilities before starting



ACCESSIBILITY CONSIDERATIONS




Font: Ensure the font face and size are legible

Images: Alt texts need to be assigned to every image in your forms

Colors: Can make reading difficult, keep an eye on your colors

Videos & Audio: Provide captions



4Point

Questions

eric.stevens@4point.com