

Document breakdown

Current usability issues with the Smart search and how the users will search content within tables for each of the following areas of Admin:

- People
- Posts
- Programmes
- Assessments

UI elements for UX review

1. Smart search for:

- People
- Posts
- Programmes
- Assessments

2. Table headers & functionality
3. Table columns

Smart Search (A)

Opposite I have listed what terms or data the 'Smart Search' looks through in regards to each Section. People, Posts, Programmes, Assessments.

We would like to know if there is anything else that the user currently 'searches' for the complete a task.

ID	Forenames	Surname	GMC number	GDC number	Public health number	Programme name	Training number	Placement grade	Placement speciality	Site	Placement type	Role	Owner	Status
246729	Rosie Frances	Johnston		271356								DR in Training	Health Education England North East	CURRENT
238745	Kath James Alexander	Johnston	4547767											INACTIVE
234509	Ian David Alexander	Johnston	2238777											CURRENT
231619	Aleah Robert	Johnston	7139822										Health Education England North East	INACTIVE
229941	Paul Stewart	Johnstone	4514172									Local Office Role	Health Education England Yorkshire and the Humber	INACTIVE
229853	Aaron David	Johnston	7014838										Health Education England Yorkshire and the Humber	INACTIVE
229673	Simon James	Johnston	6162418									DR in Training, SelfService ContactDetails, SelfService TrainingHistory	Health Education England East of England	CURRENT
22819	Jeremy Johnston	Russell	3086768									Educational Supervisor, GP Trainer		CURRENT
228706	James Allan	Johnston	6052289	6052289								Assessment Panel Member, Clinical Supervisor, Educational Supervisor	Health Education England Yorkshire and the Humber	CURRENT
227817	William	Johnston		271076								DR in Training	Health Education England Yorkshire and the Humber	CURRENT
227161	Aolbhearn	JOHNSTON	7599026									DR in Training	Health Education England	CURRENT

Example of the People landing page

People

ID Number
Surname
Forename
GMC number
Role

Posts

National post number
Program name
Current trainee
EMC number?

Programmes

Programme name
Programme number
Owner

Assessments

Curriculum name
Surname
Forename
Type

Feedback: It would be good to check to see if the Users have any additional data 'columns' that they use when searching for content

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UI elements for UX review

1. Smart search for:

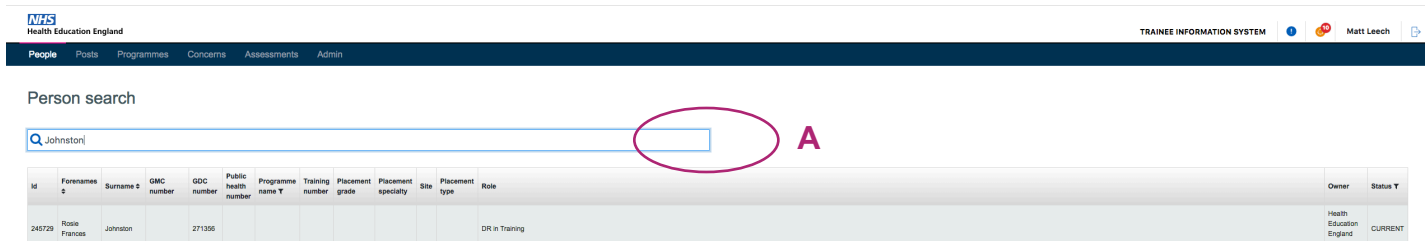
- People
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2. Table headers & functionality
3. Table columns

Breaking the Search (A)

At the moment there are a number of ways that 'break' the current search resulting in no data retrieval. I have documented what these 'Search' terms and methods are opposite.

There is also a list of what was documented on Jira as to how the search should potentially work and how the results should be displayed.



What 'breaks' the Search

Multi-column searches: e.g. - Forename Surname (spaces between words)
 Hyphens
 Commas
 Initials

What 'rules' have been suggested for 'Search' on Jira

multi term search (,) – This is not currently available in the current Search
 allow wildcard search (*) (?) (\$) – This is not currently available in the current Search
 allow exact match – Need to check with Development
 ignore letter case – This works in current search
 allow special characters (_) (-) (/) (') (@) (#) – This is not currently available in the current Search
 allow phrase search (" ") – This works in current search with names need to test with 'phrases'

What 'rules' have been suggested for 'Search Results' on Jira (Further in the doc for more detail on this)

display results linked to same ownership as user first – Not sure if this is working, can we check
 present results according to the following order:
 exact match first (A-Z, 0-10) – This is not currently available in the current Search
 close match (A-Z, 0-10) – This is not currently available in the current Search

Feedback: It would be good to check to see if the Users have any preference to searching with the rules above, if they feel it is the best way for them to use the search we can always speak with development about making changes.

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Filtering, sorting and searching within the table lists (B)

At the moment the results of a search or the general order of a list is not ordered in the most user friendly manner.

It would be good to find out what suits the User best when filtering the results or a list in a table. Opposite I highlight that we can do to help with sorting the lists for the users.

The screenshot shows the 'Posts' page in the NHS Trainee Information System. At the top, there is a search bar with the placeholder text 'Type your search term and press Enter'. Below the search bar are several filter tabs for different regions: 'CURRENT', 'Health Education England Kent, Surrey and Sussex', 'Health Education England East Midlands', 'Health Education England North West London', 'Health Education England North Central London', and 'Health Education England South London'. The 'Health Education England North West' tab is selected. Below the filters is a table with the following columns: National post number, Primary site, Approved grade, Primary specialty, Programme name, Current trainee count, Funding type, Status, and Owner. The table contains 24 rows of data. At the bottom of the table, there is a pagination control showing 'Showing 1 - 20 of 24754 items.' and a set of navigation arrows.

Example of the People landing page

Filtering, Sorting and Searching in Tables to help the user manage results

How would the Users like to be able to sort, search or filter the tables columns (If they actually need to), and for which columns would they need one of these functions.

The Tables can only have 1 of the following per column: Search, Sort (By what – date, alphabetical order etc.?), Filter

We need to make sure that this is simple to use, and only applied to columns that it will add value in.

Feedback: It would be great to run through the 4 tables for each Section and find out what 'Functional option' would best help them achieve their tasks for each column in each table..

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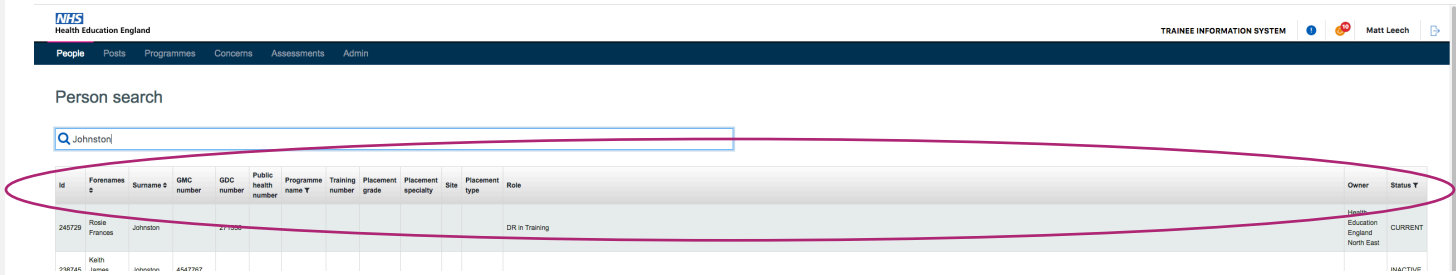
- **People**
- Posts
- Programmes
- Assessments

- 2. Table headers & functionality
- 3. Table columns

Filtering, sorting and searching within the table lists

Please can the Users review the table and functionality and let us know the following.

- 1) Are there any columns in this table that they feel add no value in regards to the tasks they perform?
- 2) When sorting/viewing the data what functionality would help them best in each column header?



People: Table columns & headers: Filters, Search or Sort

Please add a mark/indicator as to which functionality would be most useful, if none is required or if this column can be hidden

Column header	Search	Filter	Sort	No functionality	Remove column
Id					
Forenames					
Surname					
GMC number					
GDC number					
Public health number					
Programme name					
Training number					
Placement grade					
Placement specialty					
Site					
Placement type					
Role					
Owner					
Status					

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- 1) Are there any columns in this table that they feel add no value in regards to the tasks they perform?
- 2) When sorting/viewing the data what functionality would help them best in each column header?

The screenshot shows the NHS Trainee Information System interface. At the top, there's a navigation bar with 'People', 'Posts', 'Programmes', 'Concerns', 'Assessments', and 'Admin'. Below this is a search bar with the placeholder 'Type your search term and press Enter'. A filter menu is open, showing various regions, with 'Health Education England North West' selected. Below the filter is a table with the following columns: National post number, Primary site, Approved grade, Primary specialty, Programme name, Current trainee, Funding type, Status, and Owner. The table contains 20 rows of data.

National post number	Primary site	Approved grade	Primary specialty	Programme name	Current trainee	Funding type	Status	Owner
YHDIRX000/094/CTR/001	RXM00 Derbyshire Mental Health Services NHS Trust	CT Core Training		Core Psychiatry Training		NONE	CURRENT	Health Education England East Midlands
YHDIRHA00/CPT/CTR/004	RHA00 Nottinghamshire Healthcare NHS Foundation Trust	CT Core Training		Core Psychiatry Training		NONE	CURRENT	Health Education England East Midlands
YHDIRHA00/CPT/CTR/003	RHA00 Nottinghamshire Healthcare NHS Foundation Trust	CT Core Training		Core Psychiatry Training		NONE	CURRENT	Health Education England East Midlands
YHDIRHA00/CPT/CTR/002	RHA00 Nottinghamshire Healthcare NHS Foundation Trust	CT Core Training		Core Psychiatry Training		NONE	CURRENT	Health Education England East Midlands
YHDIRHA00/CPT/CTR/001	RHA00 Nottinghamshire Healthcare NHS Foundation Trust	CT Core Training		Core Psychiatry Training		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDH/052/STR/001	RFS04 Edmund Street Clinic	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/CPT/CTR/100	RFS04 Chesterfield Royal Hospital	CT Core Training		Core Psychiatry Training		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/074/STR/001	RFS04 Chesterfield Royal Hospital	HT Higher Training		Histopathology		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/053/STR/001	RFS04 Chesterfield Royal Hospital	HT Higher Training		Child and Adolescent Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/052/STR/007	RFS04 Chesterfield Royal Hospital	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/052/STR/006	RFS04 Chesterfield Royal Hospital	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/052/STR/005	RFS04 Chesterfield Royal Hospital	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/052/STR/004	RFS04 Chesterfield Royal Hospital	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/052/STR/003	RFS04 Chesterfield Royal Hospital	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands
YHDIRFSDA/052/STR/002	RFS04 Chesterfield Royal Hospital	HT Higher Training		General Psychiatry		NONE	CURRENT	Health Education England East Midlands

Posts: Table columns & headers: Filters, Search or Sort

Please add a mark/indicator as to which functionality would be most useful, if none is required or if this column can be hidden

Column header	Search	Filter	Sort	No functionality	Remove column
National post number					
Primary site					
Approved grade					
Primary specialty					
Programme name					
Current trainee					
Funding type					
Status					
Owner					

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The screenshot shows the NHS Health Education England 'Programmes' page. The navigation menu includes 'People', 'Posts', 'Programmes', 'Concerns', 'Assessments', and 'Admin'. The 'Programmes' tab is active. Below the navigation is a search bar with the placeholder text 'Type Search Term & Press Enter'. There are several tabs for different regions, with 'Health Education England North West' selected. The main content is a table with the following columns: Programme name, Programme number, Owner, and Status. The table contains 20 rows of data. A red circle highlights the table headers. At the bottom of the table, there is a pagination control showing 'Showing 1 - 20 of 458 items'.

Programme name	Programme number	Owner	Status
NWN Central Surgery (run through)	NWD4040	Health Education England North West	CURRENT
Test Programme NUM123	NUM40466	Health Education England South London	CURRENT
EMD TEST	EMDTEST	Health Education England East Midlands	CURRENT
Core Medical Training (LON212) - North West	LON212	Health Education England North West London	CURRENT
Core Medical Training KSS	6590	Health Education England Kent, Surrey and Sussex	CURRENT
test	bnm_mn	Health Education England Kent, Surrey and Sussex	CURRENT
Anaesthetics - GM	LON999	Health Education England South London	CURRENT
Diagnostic Neuropathology	EMD4035	Health Education England East Midlands	CURRENT
MER Otolaryngology Run Through	MER4033	Health Education England North West	CURRENT
Medical Training Initiative	EMD MTI	Health Education England East Midlands	CURRENT
Dummy HENW Programme for Posts	HENW_DUMMY_Post	Health Education England North West	CURRENT
NWN Otolaryngology Run Through	NWD4032	Health Education England North West	CURRENT
Dummy HENW Programme for People	HENW_DUMMY_Person	Health Education England North West	CURRENT
Public Health Dental	EMD 980	Health Education England East Midlands	CURRENT
Sport and Exercise Medicine	EMD937	Health Education England East Midlands	CURRENT
Dental Core	EMD DCT	Health Education England East Midlands	CURRENT
Dental Foundation Training - North East Scheme	EMD DFT	Health Education England East Midlands	CURRENT
Dental Foundation Training - South Scheme	EMD DFT	Health Education England East Midlands	CURRENT
Dental Foundation Training - North West Scheme	EMD DFT	Health Education England East Midlands	CURRENT
Dental Foundation Training - Central Scheme	EMD DFT	Health Education England East Midlands	CURRENT

Programmes: Table columns & headers: Filters, Search or Sort

Please add a mark/indicator as to which functionality would be most useful, if none is required or if this column can be hidden

Column header	Search	Filter	Sort	No functionality	Remove column
Programme name					
Programme number					
Owner					
Status					

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- 2) When sorting/viewing the data what functionality would help them best in each column header?

Assessments + Create a new assessment

Q Type your search term and press Enter

Trainee First Name	Trainee Surname	Type	Review date	Curriculum name	Period covered from	Period covered to	Status	Outcome
Lisa Ann	Elam	ARCP	2018-01-15				SCHEDULED	
Donna	Weland	ARCP	2018-01-09				SCHEDULED	
Donna	Weland	ARCP	2018-01-10				SCHEDULED	
Stephen Edward	Boag	ARCP	2018-01-31	Cardiology	2008-01-24	2018-01-31	SCHEDULED	
Katherine Helen	Green	ARCP	2018-01-19	General Practice - 2007	2017-08-01	2018-01-19	COMPLETED	
Katherine Helen	Green	ARCP	2018-01-15	General Practice - 2007	2018-01-01	2018-01-31	COMPLETED	
Stephen Edward	Boag	ARCP	2018-01-21	Immunology	2017-11-01	2018-01-21	SCHEDULED	
Melanie	Dowling	ARCP		Core Surgical Training	2013-08-07	2014-06-20		
Katharine Anne	Reeves	ARCP	2018-01-15	Core Anaesthetics Training	2012-08-22	2013-01-31	SCHEDULED	
Yousaf Shaheen	Khan	ARCP		Core Surgical Training - 2007	2009-08-05	2010-07-31		
Claire Victoria	Hallam	ARCP		General Practice - 2007	2008-12-01	2008-12-01		
Aafia	Mubbasher	ARCP		Foundation Programme - 2007				
Priyav Kumar	Kukreja	ARCP		Anaesthetics - 2007				
Emma	Woolley	RITA						
Mehran	Javeed	ARCP		Core Psychiatry Training - 2007	2012-07-20	2013-01-28		
Jai	Prasad	ARCP		Core Surgical Training - 2007				

Assessments: Table columns & headers: Filters, Search or Sort

Please add a mark/indicator as to which functionality would be most useful, if none is required or if this column can be hidden

Column header	Search	Filter	Sort	No functionality	Remove column
Trainee First Name					
Trainee Surname					
Type					
Review date					
Curriculum name					
Period covered from					
Period covered to					
Status					
Outcome					