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.

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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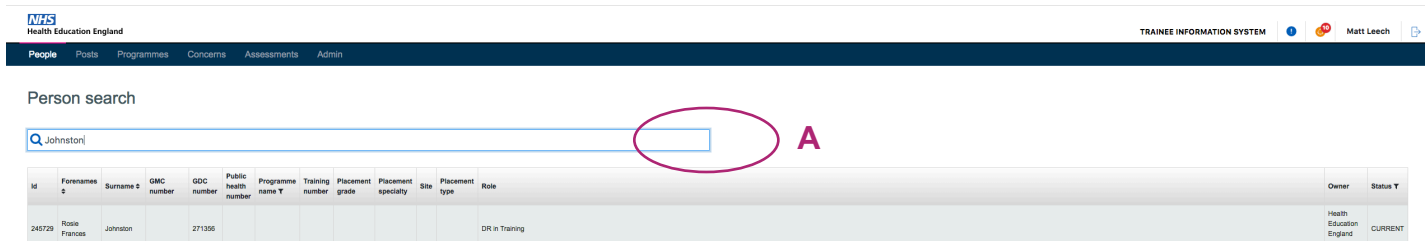- Assessments

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- -

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
Comers
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 fro them to use the search we can always speak with development about making changes.

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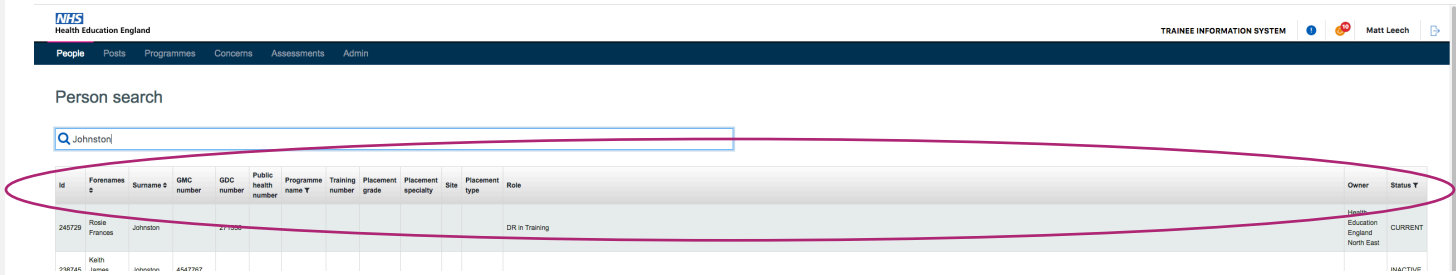- Assessments

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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 hat we can do to help with sorting the lists for the users.

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..

NHS
Health Education England

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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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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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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: 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					