**Employee Relations**

May 2, 2011

The following review is based on the Employee Relations Application as of March 28, 2011, and included a usability assessment of potential issues and opportunities for improvement. Where appropriate, suggested modifications have been identified related to flow or the general application.

Use Cases (overview):

- View open, closed and re-opened actions
- Sort by categorization such as type of action, department, or date
- Look up Individual Action
- View all actions for an individual
- Create/Modify an action

Flow:

The current application flow combines all the possible use cases within the same structure. While this may be programmatically efficient, it proves to confuse the user with misplaced form fields and makes the creation, navigation and editing of actions difficult. Outlined is a high level of the current application, and potential issues.
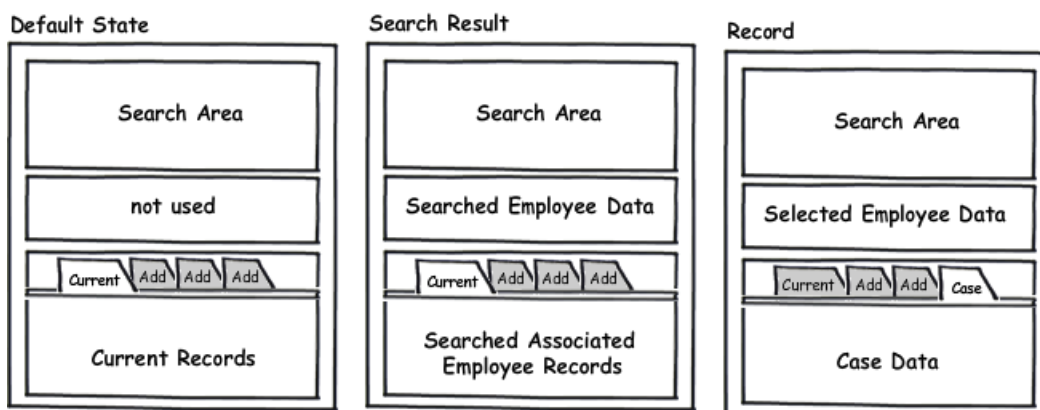
Default State Issues:

Identified are issues most commonly experienced in the default or initial search actions.

No method to view current records

When first entering the application the user has a blank history display. If the user clicks search, a display of all the records is available. This starting point usually designated as the homepage is not created intuitively. The only way to get back to this default state is to blank out (in this case 00000000) the personnel number, where the history tab then displays all information.

Recommendation: Have a default record state to avoid searches for in-progress actions.

No easy method to finding an employee

To find an employee the user must either filter through all the results or search via personnel number. A person search is available, but requires the user to click a mystery button next to personnel number for the purpose of finding a personnel number, which is a search criterion, not an end result.

The resulting action from the sub-name search is identifying the personnel number, and does not in itself initiate the search.

Recommendation: Make First/Last name search field on the same screen as the others, not a sub-search.

Search criteria is not accurate

When performing a search, elements that produce a null value are ignored. For example when multiple departments are selected that do not contain any records all records are shown. Only when there is at least one result is the result set reduced to the actual number.

Recommendation: Search should work as intended, limiting records where appropriate.

No way to reset search

Currently there is no reset to search. Fields need to be emptied manually.

Search Results Issues:

When a user performs a search, depending on the criteria used the search performs differently, utilizing differing parts of the screen to display data.

If a 'personnel number' search is done the Employee Data section is populated, and the 'history' tab shows all the available actions the given person.

When a search for multiple values is used, such as a date range or department, the history tab contents are replaced with search results. Because of this the context of displaying a person's available actions is never created.

In one instance the user has a nice overview by the person, in the other this overview does not exist.

Search display is not consistent

The Search Results area and Employee Data are not consistent depending on the criteria.

Recommendation: Vary the display based on the data results set so the user can always see all actions by a person in some view.

Tabs are not tabs

The tabs including history, corrective action, complaints and accommodations are a mixture of tabs and buttons. The History tab is sometimes the search result and sometimes a listing of all actions. Depending on the use case the other tabs are either activators to create new instances of corrective action, complaints or accommodations or simply the categorization of the current action you are viewing.

Tabs generally indicate a grouping of data based on a common theme. Tabs from the search results would be expected to be History (all actions within the parameters), Corrective Action (All Corrective Actions from within the result sets) with the Complaints and accommodations the same as corrective action.

This causes additional problems in the interface when corrective action, complaint or accommodation tabs are clicked to begin an action without an associated individual.

Recommendation: Replace Corrective Action, Complaints and Accommodation into context sensitive buttons, not active tabs.

Individual Record Issues:

A new action is created by first matching a personnel number with a record. Once this has been established (via the search) action data can be entered.

Mechanism to add and remove activities

Multiple Activities can be saved within a case, but the user must save, exit and re-enter the record to accomplish this.

Recommendation: Allow to add and remove from the record.

Use of codes

Within the application there is use of proprietary codes necessary to complete work. It would be better spell these out in plain English, eliminating a potential training issue, and reducing errors.

Non Standard Attachments

Attachments are accommodated through a MS Word interface where documents are attached to the record. There are numerous issues with using this method for attachments.

Firstly, it is non-standard, simply taking the user to the MS Word interface without instruction within the application. Secondly, the notes functionality is akin to a black box, you cannot know what is in the box unless you open it, from there you need to decipher the attachments, or notes within. There is no history of attachments, date attached or any meta data to explain the contents of each item. Lastly, there are no indicators to the absence of presence of notes from the parent application. The button remains the same regardless of its state.

A proper implementation would contain:

A) In-product method of adding attachments. While a solution does not need to be native to the application it does need to feel as it is part of the same application.

B) Standardized display of meta data (ex: who uploaded, when and short description)

C) Notification of number of attachments (or no attachments)

Layout:

Efficiency of Layout

Screens should be designed to accommodate a standard resolution (1024x768) with a maximum width of 960px avoiding vertical scrolling as much as possible.

The current layout does not utilize the display to maximize the screen real estate. As a result, the user must scroll to get to any of the record information. Problems in the current design include not utilizing the horizontal space (currently using about ½ the space available), gaps between form fields and form fields and their labels, and efficient organization of form elements.
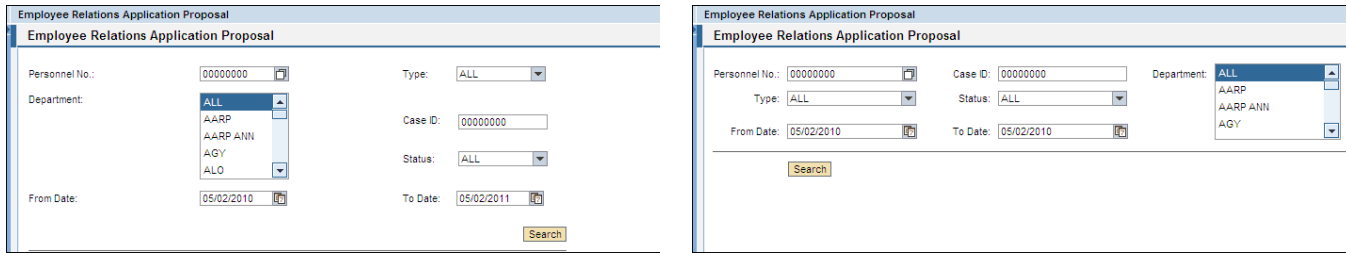
Above is a representation of the current and a revised space, where the revised version (to the right) reduces the height of the field area by 1/3 and groups related fields (date fields) for added clarity.

Fields sized improperly

Fields should be sized to accommodate the data that they contain. To the right is an example of a form field that only show the contents when it is expanded.
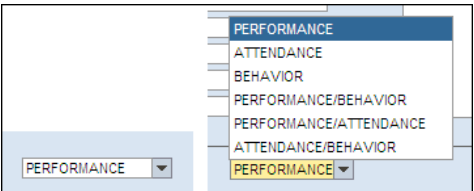

Data Grouped Improperly

When a screen is broken up into three distinct sections as is this application each area is perceived as being separated from the others.

In the example to the right, the top most image is the current application. The bottom image simply moves the Employee Data within the colored area. By doing this, the Employee Data, which is information about the record, is visually tied to the record.

When the areas are separated the design must work harder to convey the message of what elements are connected and what are not.
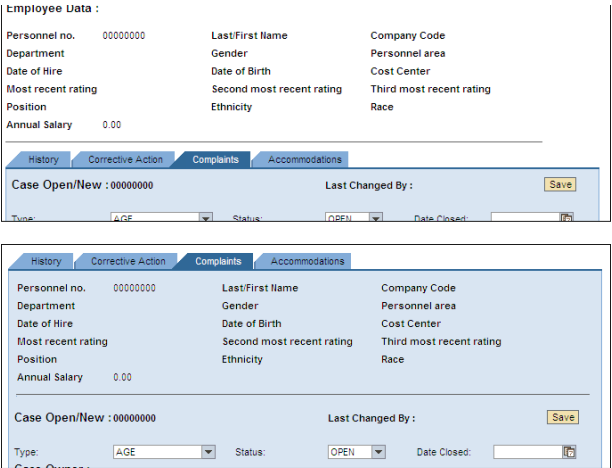
Revised Application

Below is a set of screen mockups that clearly separate the application based on the use cases. These are to indicate general flow and functionality but may not include all fields.

- Clear distinction between reviewing existing records, searching for records and creating a new record.
- Current Records works as a 'homepage' for the application, sorting the available records by open records and their corresponding date (newest on top)

Default State

ID	Number	Name	Dept	Activity	Status	Start	Close	
0	000	abc	CID	Complaints	Open	00/00	00/00	new
0	000	abc	CID	Complaints	Open	00/00	00/00	new
0	000	abc	CID	Complaints	Open	00/00	00/00	new
0	000	abc	CID	Complaints	Open	00/00	00/00	new
0	000	abc	CID	Complaints	Open	00/00	00/00	new
0	000	abc	CID	Complaints	Open	00/00	00/00	new

Tabs: Current Records | Search — New Record

- Name is a search parameter.
- Search is a tabbed interface between 'Current Records' and 'Search'.
- Date fields are collapsed to include date widget.
- Search results are presented below the search. From the results the user can view records or create new records based on the results displayed.

Search

Tabs: Current Records | Search — New Record

Fields: Personnel No, Name, Department, Activity, Status, Department

Search

ID	Number	Name	Dept	Activity	Status	Start	Close

- 'New Record' button takes the user the process of creating a new record.
- Part of the new record process searches for existing records to choose to edit or create new record.
- Choosing an activity type is a pre-requisite for starting a record.

New Record

Tabs: Current Records | Search — New Record

Personnel No
Name
Look Up

Personnel Number: xxx: xxx:
Department: xxxxx: xxxxx:
Date Of Hire: x xxx: x xxx:
xxx:

ID	Number	Name	Dept	Activity	Status	Start	Close

Activity Type ▼   Create New

- Editing record is separated from finding or creating records.
- All information on page is relevant to the process being edited.

Edit Record

Tabs: Current Records | Search — New Record

Personnel Number: xxx: xxx:
Department: xxxxx: xxxxx:
Date Of Hire: x xxx: x xxx:
xxx:

Corrective Action:

Save