

**UPDATES TO THE STYLE
OF EPORTFOLIO
FOR 2015**

**NHS ePortfolios
November 2014**

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Overview

What is the plan for the style of ePortfolio in 2015?

By the start of 2015, the NHS ePortfolios platform (ePortfolio) will receive an updated style.

This change will see the site get a more modern look and feel, and improve its usability on touch screen devices such as smartphones, phablets and tablets.

This document provides some more information about this change, specifics of what is changing and importantly what is not changing, some of the reasons for the change, what benefits are expected as a result, and the timeline for preparation and implementation.

Who is going to be affected by this?

All users are in scope for this change, which will be applied across the whole platform simultaneously. Please note that this is a cosmetic change to the look and feel of the site rather than the underlying system, which will be unchanged.

Why is the change being made?

One of the main drivers behind this change is the steady growth in usage of the site on touch screen devices. (15% of all users are now accessing on touch screen devices).

Our primary goal is to enable us to make ePortfolio work better on touchscreen devices such as smartphone, phablet and tablet form factor devices. To work best on these devices, pages need to be responsive to varying screen sizes and also need to have buttons / menus that are larger and easier to select on touchscreens.

There are some elements where allowance must be made for the lack of a mouse pointer and so within the new style of ePortfolio, we will be reworking functionality that currently requires hovering – e.g. as used for navigation through menus.

Since the current style of the site dates from 2008, another driver of the change is to modernise the look and feel of the site.

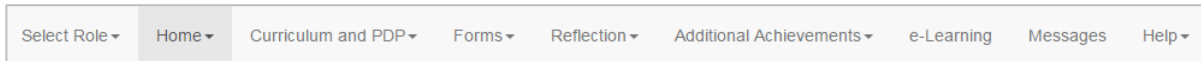
What are the key messages regarding this change?

- This change is scheduled for late December 2014.
- It will lead to a more user-friendly ePortfolio experience.
- The user interface will have a more modern/ intuitive look and feel.
- The site will work better on smartphones, phablets and tablets.
- It is primarily a cosmetic change: the underlying system is unaffected.
- No data will be lost or workflows changed as a result of this.

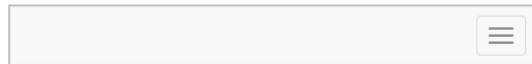
What is changing

How are menus changing?

Under the new style, menus will remain visible at the top of the window when the page is scrolled. Additionally, menus will collapse to a single row containing a single button that the user can click to expand and then navigate, if the window is less than a certain width. This makes the site easier to use, and stops the menu becoming illegible, on narrower screens. To illustrate, a menu that on a “normal” desktop computer would look like this...



...but look like this when viewed on a narrow screen device:



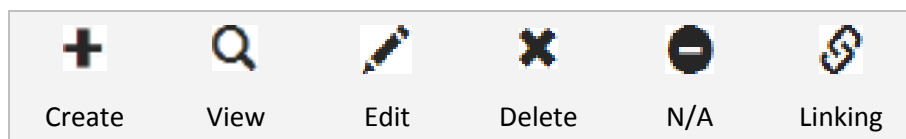
Finally, menus will not rely on hovering to navigate, since touchscreen users cannot “hover” due to not having an onscreen pointer. Menus will require a “click or “press” action to open, and will no longer snap closed if the mouse pointer exits the menu.

How are buttons changing?

In the majority of cases, the text labels on buttons will remain the same. Only in a few select instances will the labels on buttons change and we will consult with stakeholders on any proposed changes. Buttons will generally be made larger, making selection easier on touchscreen devices.

How will icons be changing?

A major benefit of the change is an update to how icons are used on the site. We will be introducing an updated style of icons and more importantly, using them consistently across ePortfolio. e.g:



How will forms be changing?

The new style allows us to make forms that adjust in layout based on the width of the screen. For example, the width of form elements like fields and labels can change to fit the width of the screen, and labels can be repositioned vertically above form fields that then to the if there is insufficient space. This is a more user-friendly way to present the page on narrower screen devices, and makes forms easier to use. This approach will initially be applied to self-managed forms created by site administrators.

What is staying the same

Will any data be deleted?

As this is a cosmetic change, there will be no change to user data within the underlying database.

The purpose of this project is to provide an updated and user-friendlier “top coat” while leaving the underlying system, the database and data unchanged.

Will my workflows be changing?

Importantly, we are not changing user workflows as part of this style update.

As part of the change, users will retain the same functionality as before, forms and reports will work the same and the layout of ePortfolio will remain the largely the same (with a few exceptions such as the Home Page).

This approach is deliberate so that changes required to documentation should be minimal.

Will forms be changing style also?

Self-managed forms, created by site administrators will automatically adapt to display in a more user-friendly manner on narrower screens (e.g. displaying field labels above the field instead of to the left of fields).

Custom forms, individually developed on behalf of site owners by the NES personnel, will not be changed. This is because site owners have historically specified how the custom forms should be arranged, often to mirror a pre-existing form.

Custom forms can be updated to behave in this manner, upon request by stakeholder.

Accompanying enhancements

How will the Home Page change?

The Home Page is one of the few pages to receive a substantial change in layout as well as style as part of this change.

The aim is to make the Home Page faster to display, user-friendlier and remove current redundancies that exist in its functionality. The most visible change is a move to display widgets using a tabbed interface.

Rather than the existing approach where widgets are small panels that users often have to scroll into view, the tabbed interface will contain indicators showing at a glance which items require attention, and clicking upon a tab will display the tab/widget contents as the contents of the tab/widget no longer have as much constraint on space widgets can be updated to contain more information, often negating the need for users to navigate elsewhere before performing an action.

A mock-up of a home page showing the tabbed interface in situ is shown below:

The screenshot displays the ePortfolio Home Page with a navigation menu at the top: ePortfolio, Select Role, Home, Curriculum and PDP, Forms, Reflection, Additional Achievements, e-Learning, Messages, and Help. Below the menu is a tabbed interface with tabs for Home, Tickets (1), Messages (1), Activity (1), and Courses and Seminars (1). The main content area is titled "Posts and supervisors in your current training programme." and lists two training posts for FY1 at Royal London Hospital. Below this is a "Form Status" section for FY1 - Royal London Hospital (29 Apr 2014 to 26 Aug 2014), which contains a table of forms with their status and actions.

Form	Status
✗ F1 Induction Meeting with Clinical Supervisor (M)	+ Create Ticket
✗ Initial Meeting with Educational Supervisor	+ Create Ticket
✗ Combined Induction Meeting with Clinical Supervisor & Initial Meeting with Educational Supervisor	+ Create Ticket
✗ Mid-placement review	+ Create Ticket
✗ Clinical Supervisors End of Placement Report	✗ Ticket
✗ Educational Supervisors End of Placement Report	✗ Ticket
✗ Educational Supervisor's End of Year Report	✗ Ticket
✗ Mid-year Review	+ Create Ticket
✗ Conditions of taking up a training post F1	+ Create

(M) denotes form is mandatory

The right-hand sidebar contains several widgets: "Current Post" showing details for FY1 (Grade, Dates, Location, Specialty, Supervisors); "Personal Library Space" showing 1.08MB used out of 100MB (0%); and "Quick Links" with a list of links: Messages, Request an assessment, Personal Library, Forms Summary, Personal Development Plan, Meetings and forms chronologically, and Timeline. At the bottom, it shows "Last login on Tuesday 15 July 2014 3:01 PM".

Branding and logos

Will our logos and branding remain the same?

Individual sites will remain branded with site specific logos and colour schemes. The size of branding will change slightly, to reflect that we are making the site more flexible to be viewed easily on mobiles and tablets.

The top branding bar position will remain the same as at present, above the menu.

We will consult with stakeholders regarding preferences for logos and branding. Branding opportunities will be approximately the same size as they are at present for desktop/tablet users and we will confirm sizing of branding opportunities on mobile devices nearer to the go live date. (Note” The current site has zero branding opportunities when viewed on a mobile device, and we will be introducing some appropriately-sized opportunities.)

Where will logos go under the new style?

Under the new style, logos will be at the top of the page as at present. One difference is the logo will “stick” to the top of the window when the page is scrolled, along with the menu.

Some sites have a split logo arrangement, whereby there is a main site logo on one side and a location logo on the other side. These will be brought together and amalgamated into one single logo, so there is a consistent approach across all sites.

Will tailoring of colour schemes be possible?

The new style and colour scheme will be rolled out across all sites and will have a default colour scheme. However this provides options for site-specific tailoring on colour schemes which we can consult with you on. Future tailoring options are as follows:

- You can change the page canvas background.
- You can change the menu bar background.
- You can change the top branding bar background and logo.

What are the restrictions on tailoring, and why?

The central section showing the content (“the viewport”) needs to stay the same colour to ensure text visibility and so will not be able to receive tailoring. Similarly, the top branding bar, logo and menu will be presented in a fixed location to ensure user interface consistency can be maintained for users of multiple sites (e.g. some supervisors regularly interact with both Foundation and Undergraduate ePortfolios simultaneously). This also reduces the overhead for the production of training materials for shared functionality.