OpenERP Useability

Preparing v6.2

Area of investment v6.2

- **User Interface: 55%**
  - Easy to use / configure / install
  - Sexy & clean features
- Social: 10%
- Framework: 20%
- Bugfixes/cleaning: 10%
- New Features: 5%

Our useability goal, by order of importance:

1. Make it easier
2. Make it more productive (less important)

Useability Process

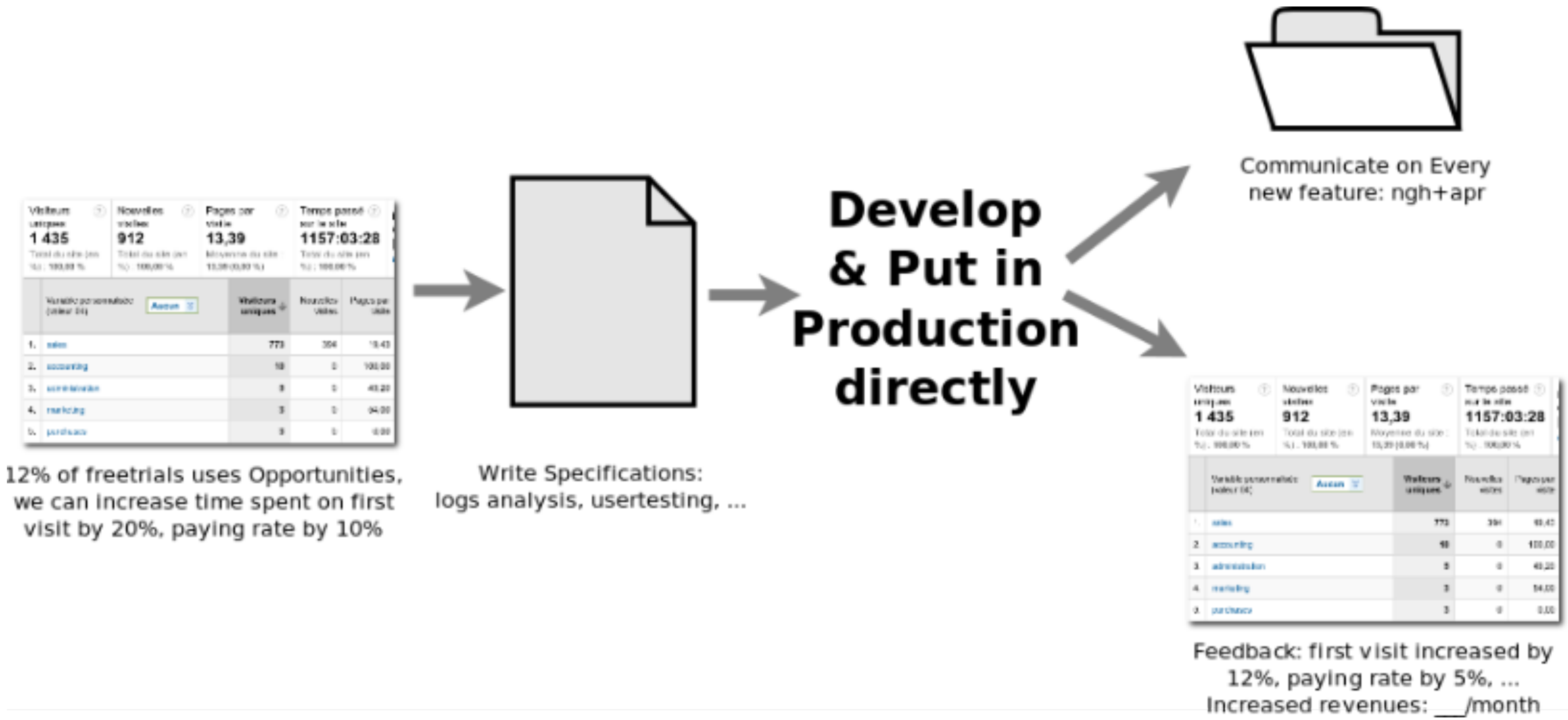
Develop Applications for ourself

- The best/only way to make an application become perfect is to **use it for ourselves** !

- V6.2 goal: focus & put in production @OpenERP SA:
  - Purchase Management
  - Partner portal: social discussions, sharing of docs, ...
  - All HR Features: appraisals, expense, leaves: partially done
  - Events: partially done
  - Multi-companies: partially done

Useability Process

- We need to analyze: Google Analytics on SaaS
  - Statistics to know what to improve
  - Measurable feedback to know how to improve
- Organize communication on every new features
- Do user testing with lambda users per new feature, at least one usertesting.com per feature.



Context is important

You work for a project, in a warehouse, ...

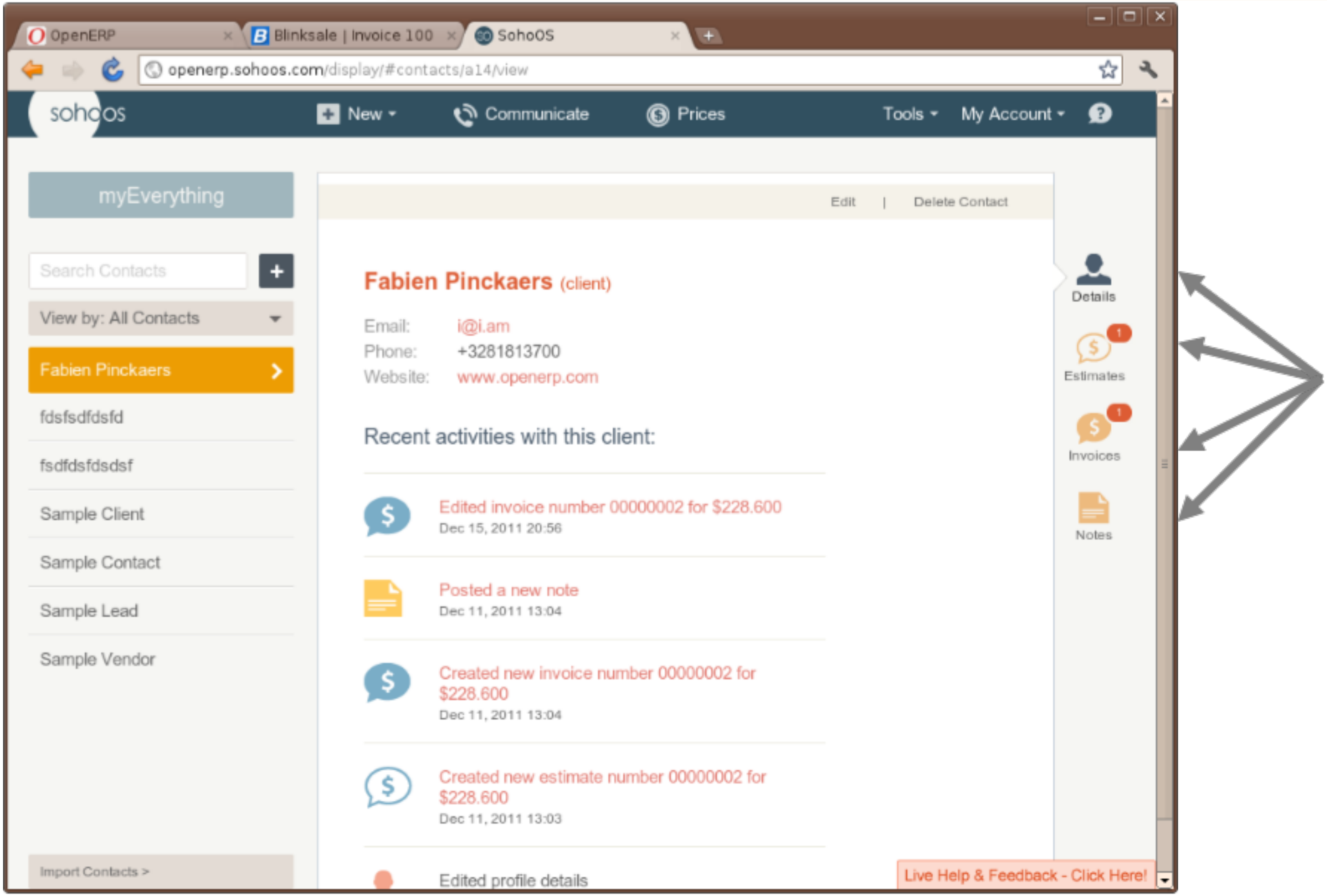
Context: Project

- Instead of going to tasks, issues and then filter → you enter a project and get related tasks, issues, ... (like in github, launchpad, trac)

- The project becomes the context.
- From the project, you can:
  - View tasks
  - View issues
  - Get billing info: invoices...

- Same for warehouse, customers, products, hr department, ... (a worker work in a warehouse, he does not want to filter on a warehouse)
  - → Improvement of our relate & global context feature

Example: SohoOs



OpenERP
OPEN SOURCE MANAGEMENT SOLUTION

Simplification → Remove Elements

Simplification through reduction

- To simplify, we must reduce!
- Remove what's:
  - Redundant
  - Not used
- Put in extended view:
  - What's not required to use the application

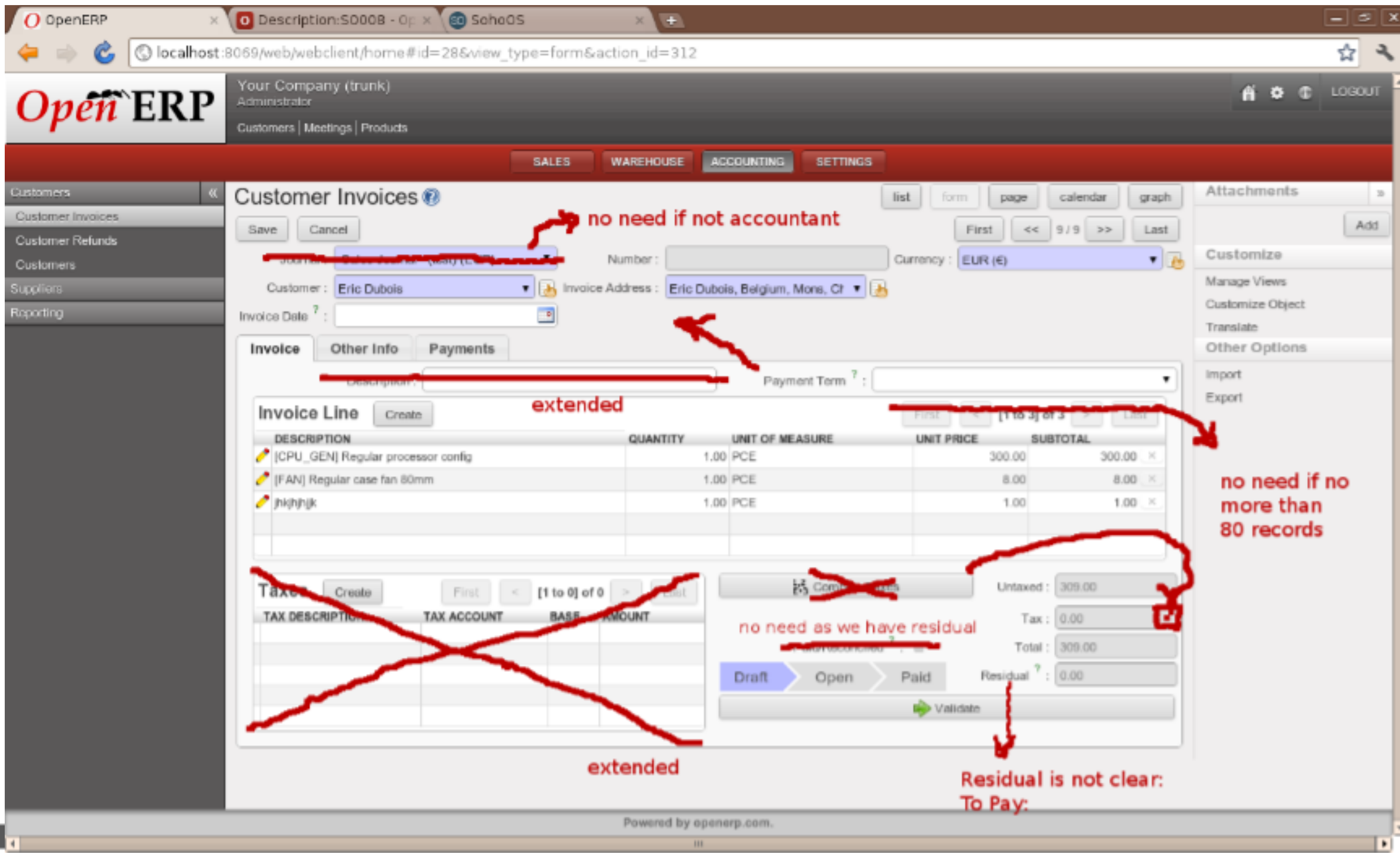
Remove redundant/unused features

- To be removed:
  - Shortcuts → if the menu is simple, we don't need shortcuts. This would require to review the menu.
  - Homepage → directly go to the latest application. Confusing to have two way to access a root app like “Sale”.
  - Dashboards → nobody use them, put in Reporting section
  - Top right toolbar → with home, preferences, help...; simplify ala google
  - Pager / Multi-Views on one2many → only if several exists
  - Menu tips (use them in empty lists or help tooltip only)
  - Res.Logs (directly integrated in the history of a document, through the new “chatter” system)
  - Relate buttons on right → replaced by search criteria that stays between menus.
  - Default filters on state for list views
  - Edit icon (pencil) in lists (they click on the record, then click edit)

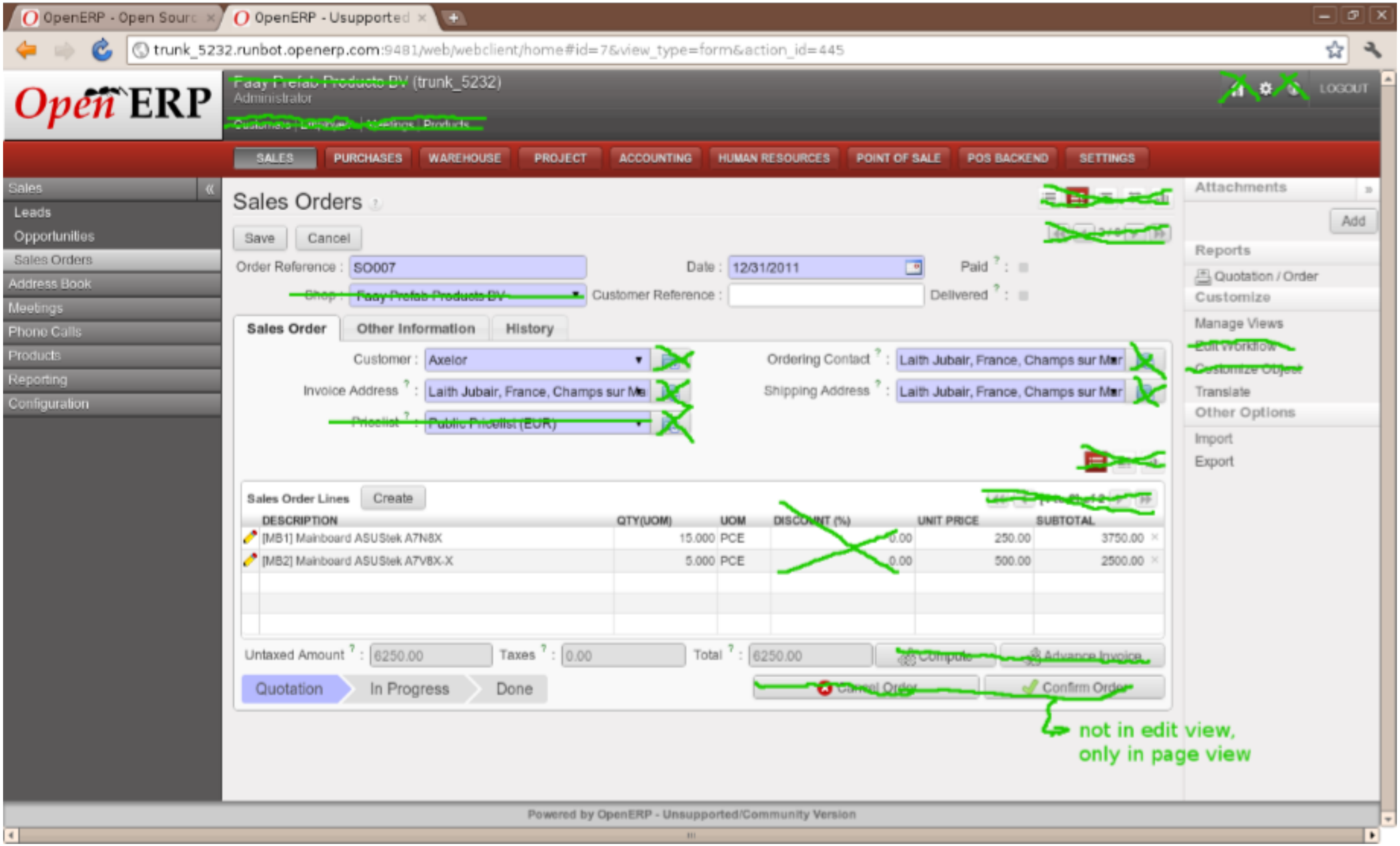
Extended View: Simplify Forms

We don't need all those stuff in simplified view!

Current forms are overloaded.



Extended View: Web Client Elements

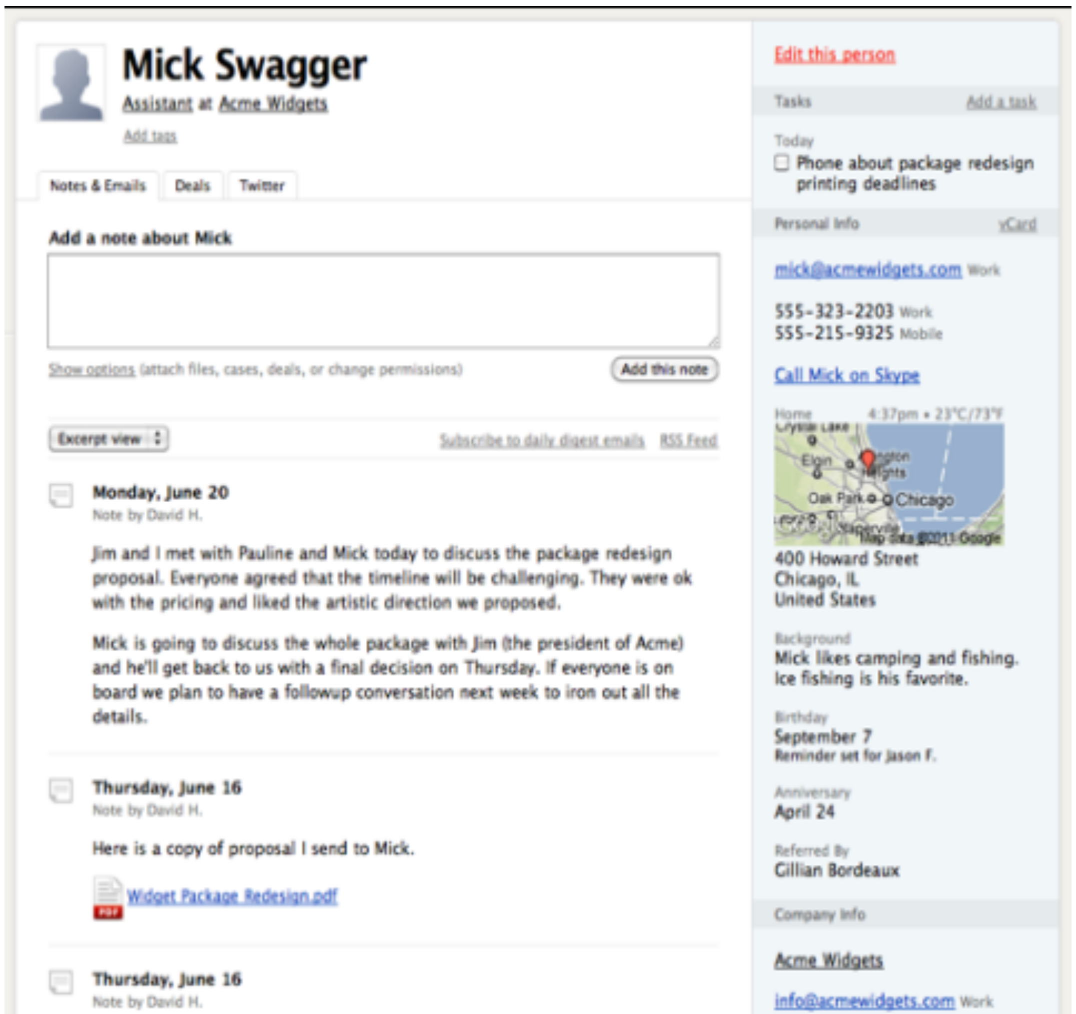


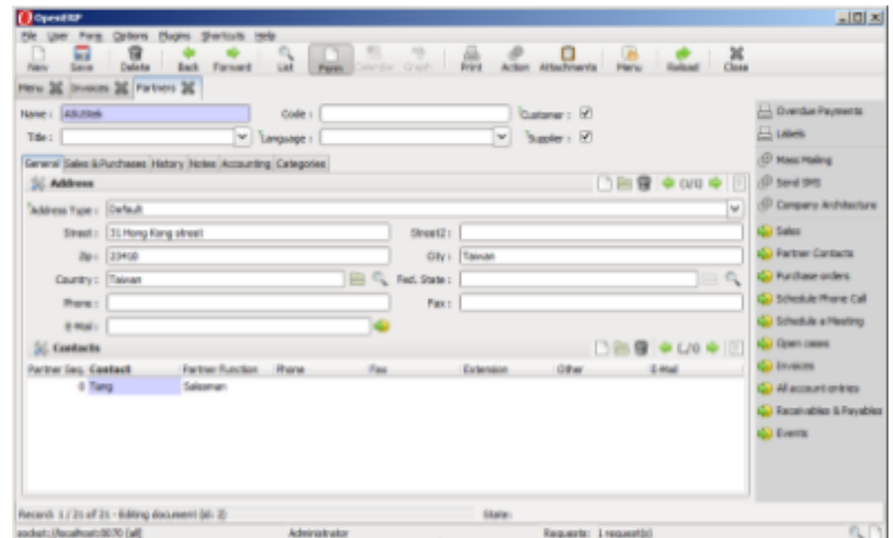
Page view of documents

An invoice should look like an invoice.

Information is beautifull

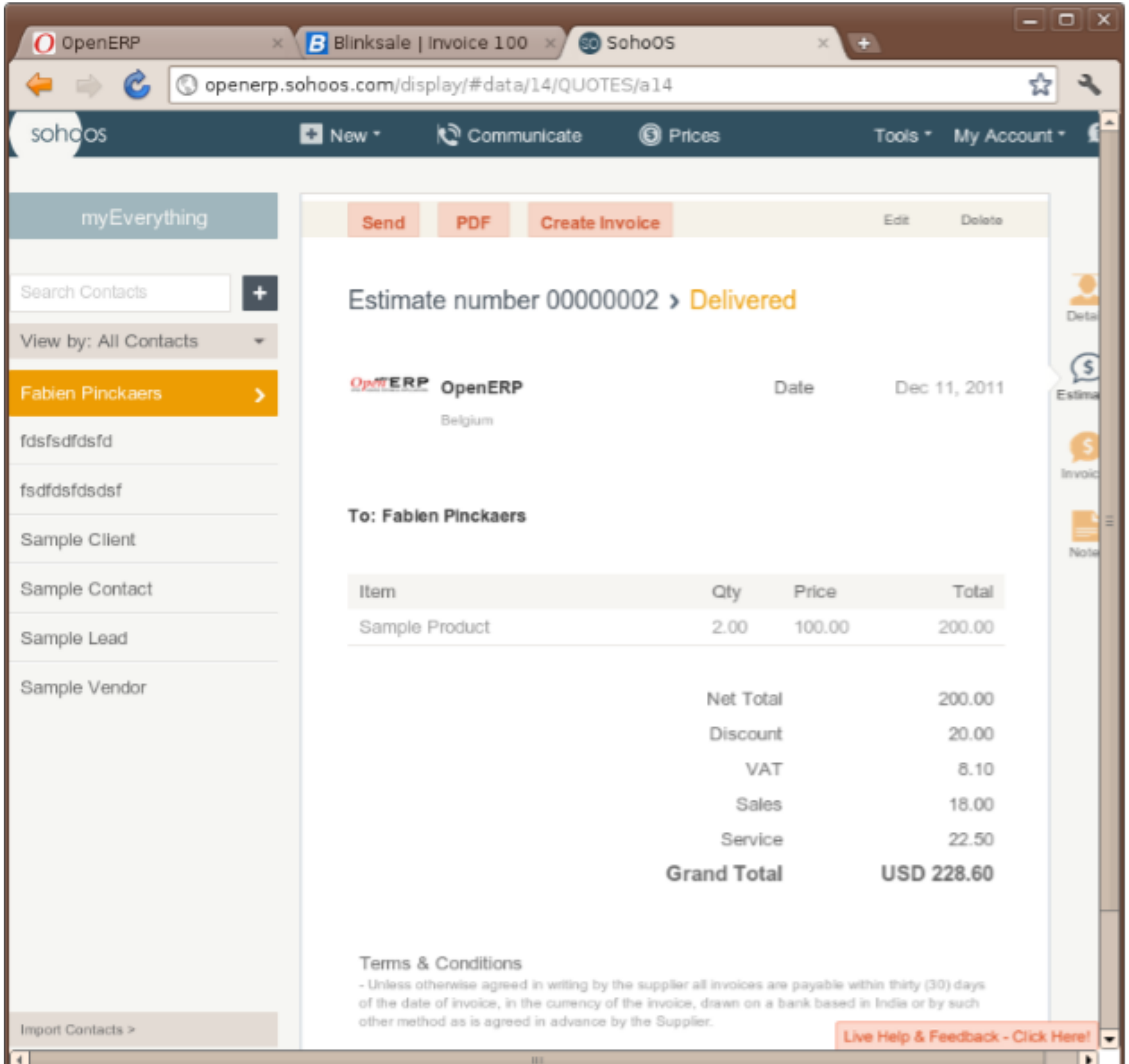
OpenERP forms have been designed for a creation / edition purpose. But when people **browse existing data**, they have a completely different need. We need to **show the information** efficiently !





Not usefull when browsing or using customers, but good for creation !
I propose to create a **PAGE view,** which is the current readonly form → example on **partners**.

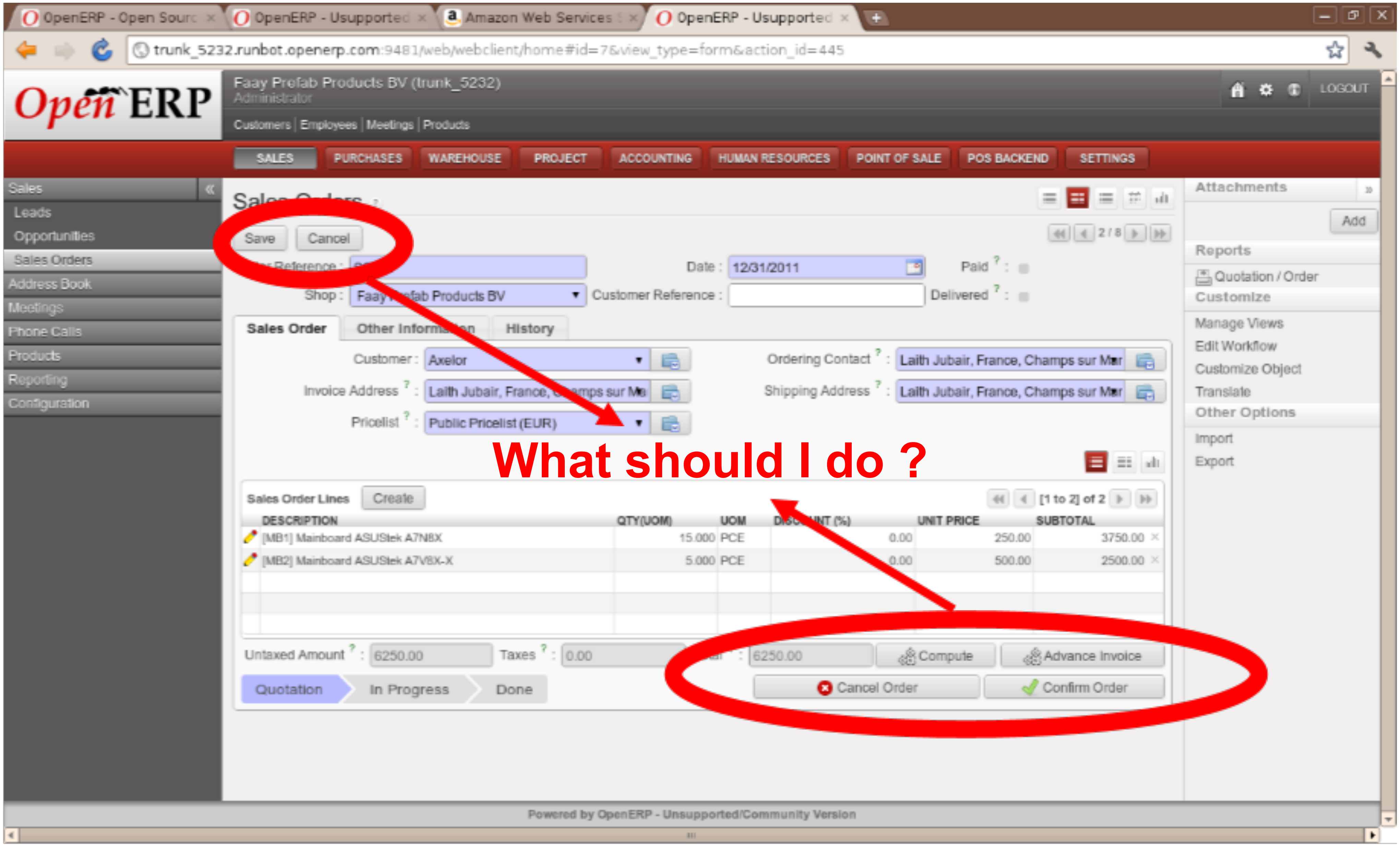
Page View, example 2



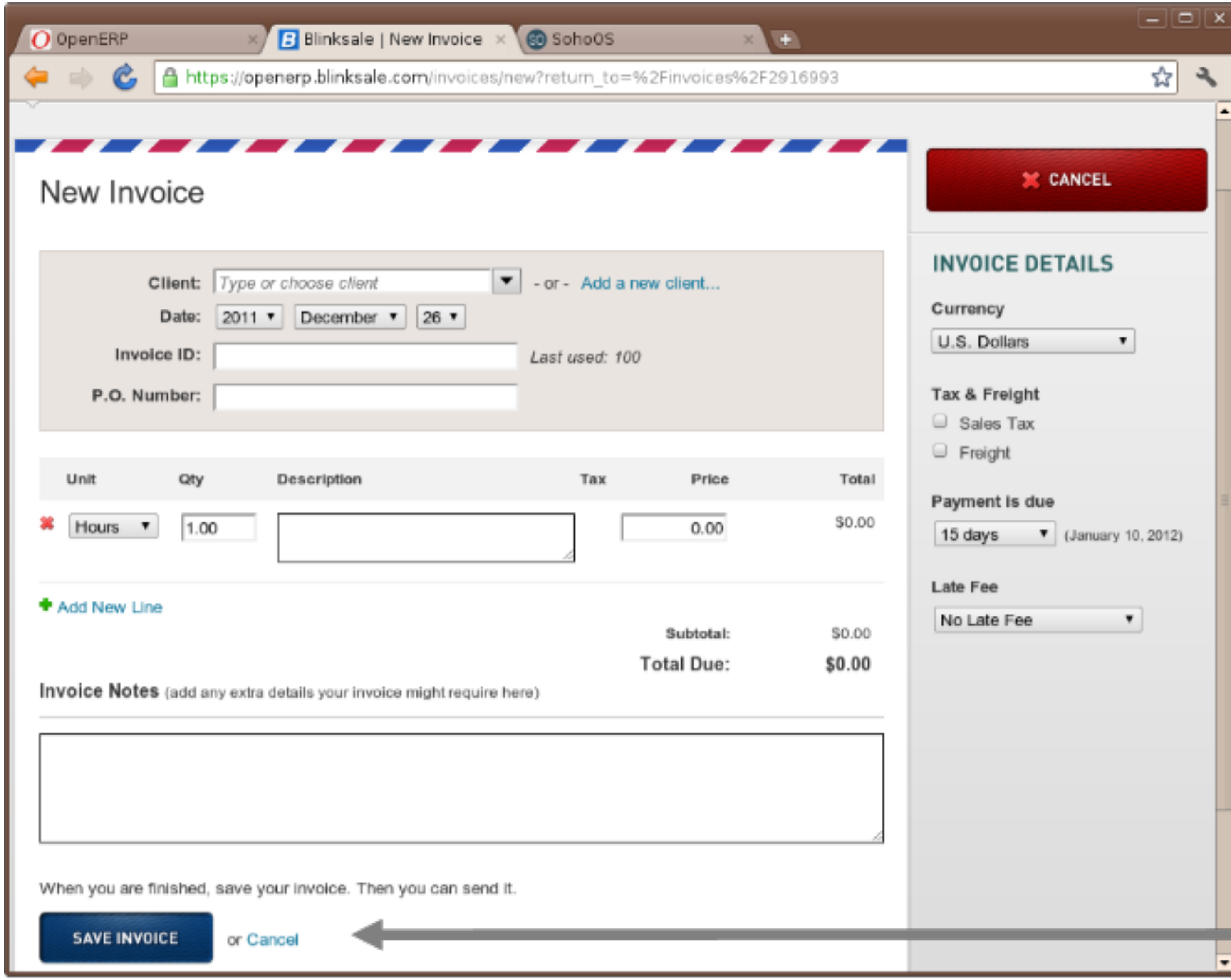
Don't make me think.

We should better guide the user to the next step

Next Steps: not too much possibilities



Propose next steps



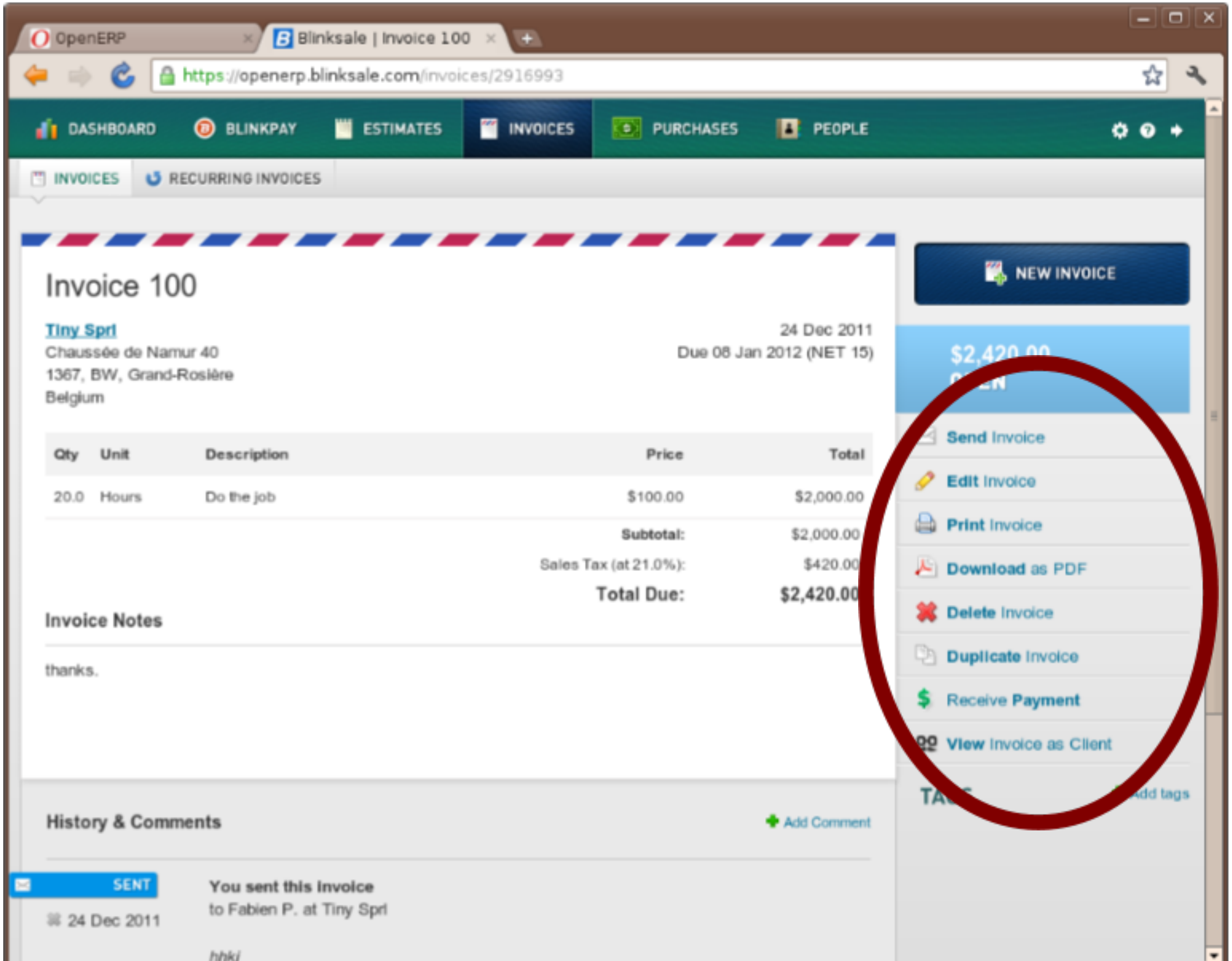
Only one main button/option

Proposition

- No button in a “form” view, unless used for useability like filing a lis tof fields (should be avoided)
- Only “Save” and “Cancel” in form/edit view
- After saving in edit view, you arrive on page view for preview of document and actions (send, confirm, ...)
- No difference between the type of actions:
  - Reports, Wizards, Edit, Delete, → They all are actions. Most users will not understand why some actions are different (right toolbar, bottom of screen, top toolbar)
- In Page/Kanban view: action button:
  - Confirm Invoice,
  - Cancel,
  - Edit, Print, ...

OpenERP
OPEN SOURCE MANAGEMENT SOLUTION

Example: blinksale.com

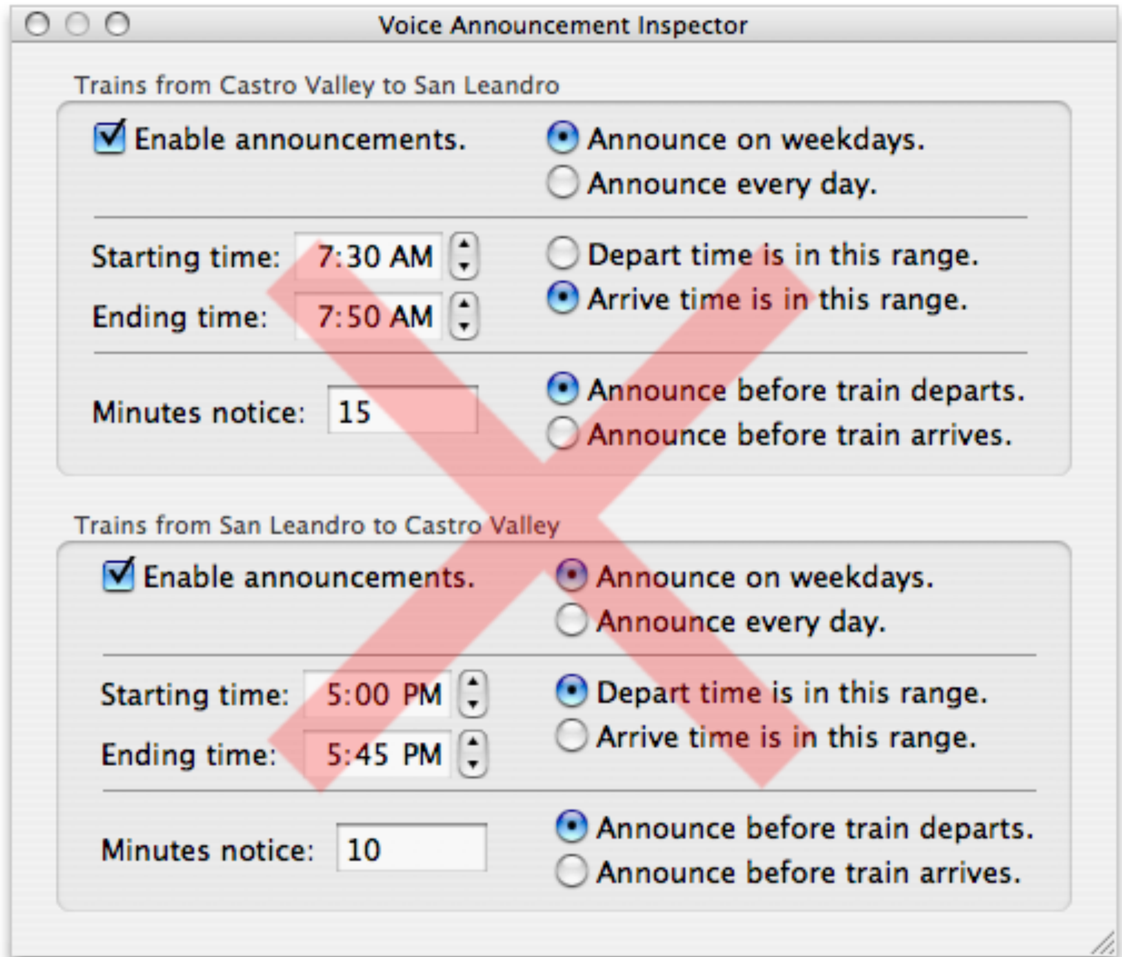


Easy to use / configure

Explain complex features

Explain complex features (1/4)

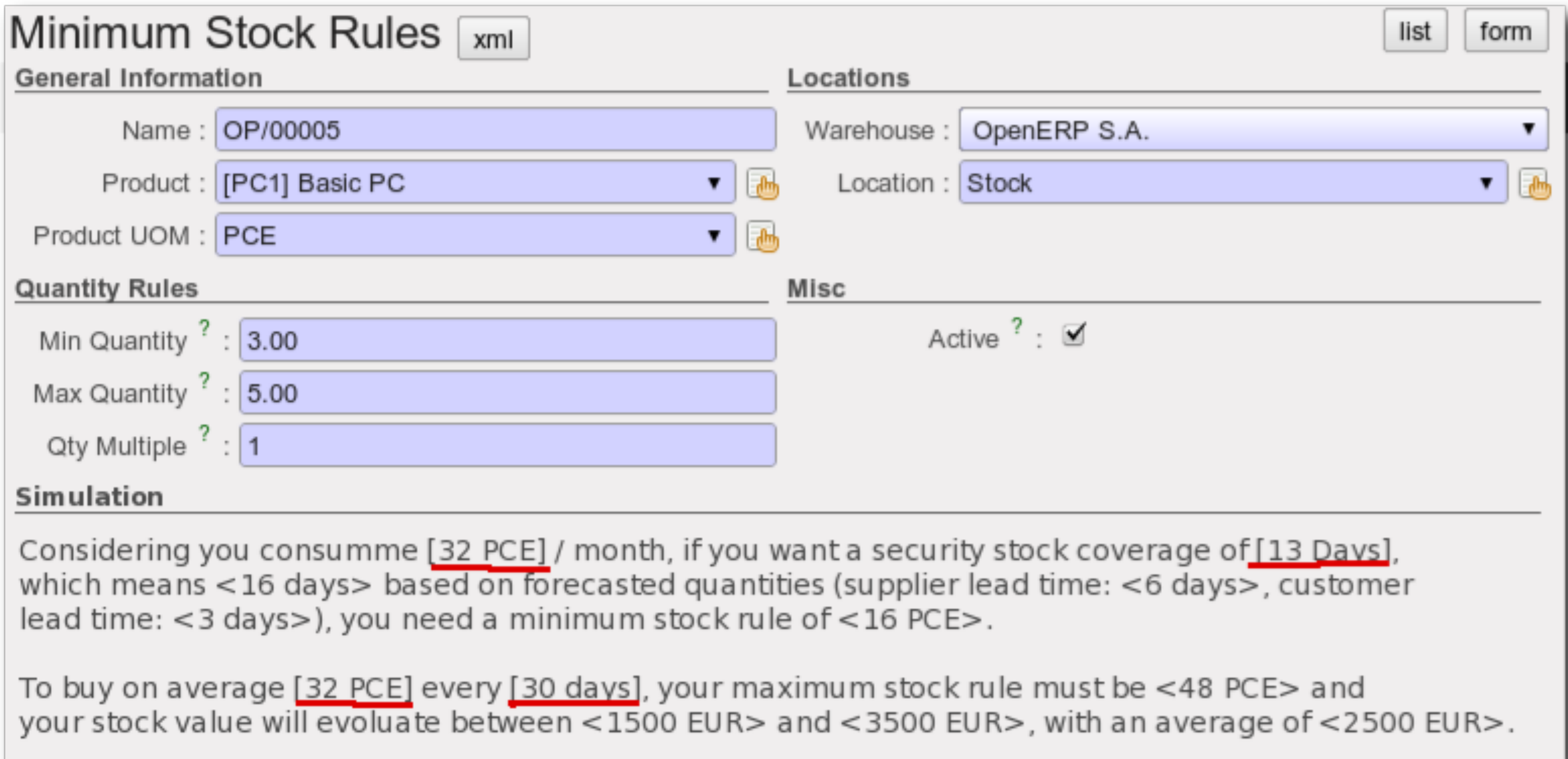
Complex features must be explained
by an image or a **dynamic sentence**.



← Javascript Tangle lib

Explain complex features (2/4)

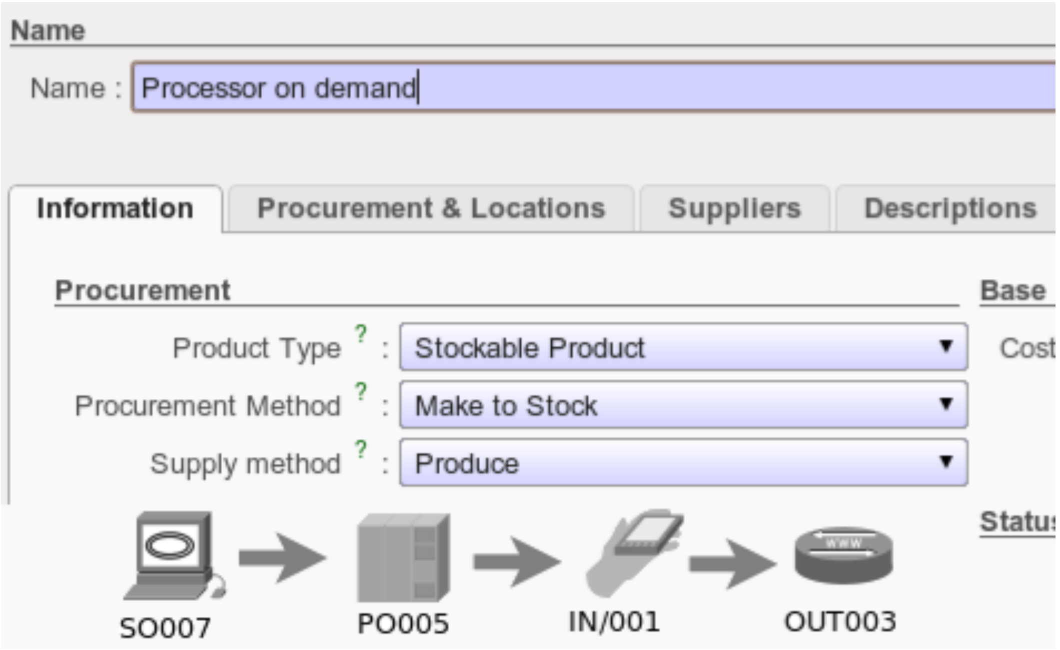
Complex features must be explained
by an image or a **dynamic sentence**.



Test Tangle here: http://worrydream.com/#!/Tangle
It's impossible to compute good mini/maxi without complex computations !

Explain complex features (3/4)

Complex features must be explained
by **an image** or a dynamic sentence.



When changing a value, it updates the flow schema.

Explain complex features (4/4)

List of complex features:

- Product Procurement methods
- SO Picking/Invoice methods
- PO Invoice Control
- Minimum Stock Rules
- Push / Pull logistic rules
- Lead Times (product/company)
- Automated Actions
- Traceability
- Others... ?

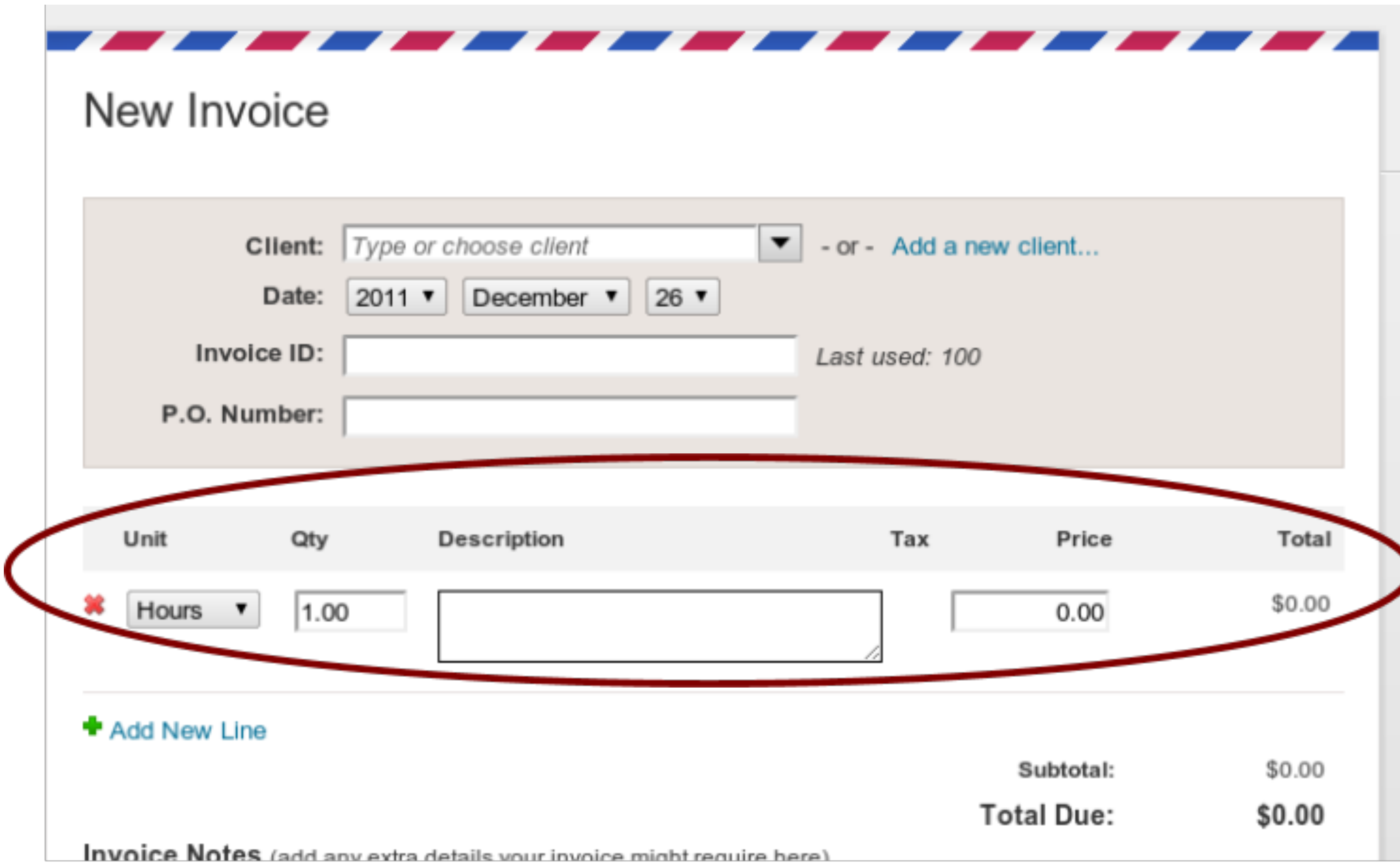
Misc Improvements

Misc

- OpenERP Online:
  - No distinction between CC and instances (add a “Control Center” button in instances, use same login=their email).
  - Login button on our website
- Documentation of the installation to review
- Do we need shortcuts ?
  - If yes, should be with custom domain/context like “Save as a filter”

Misc: editable lists

- Editable lists are not good, this is better:
  - One created by default
  - Allows more complex lines



Sexy User Interface Ideas

Improving Kanban

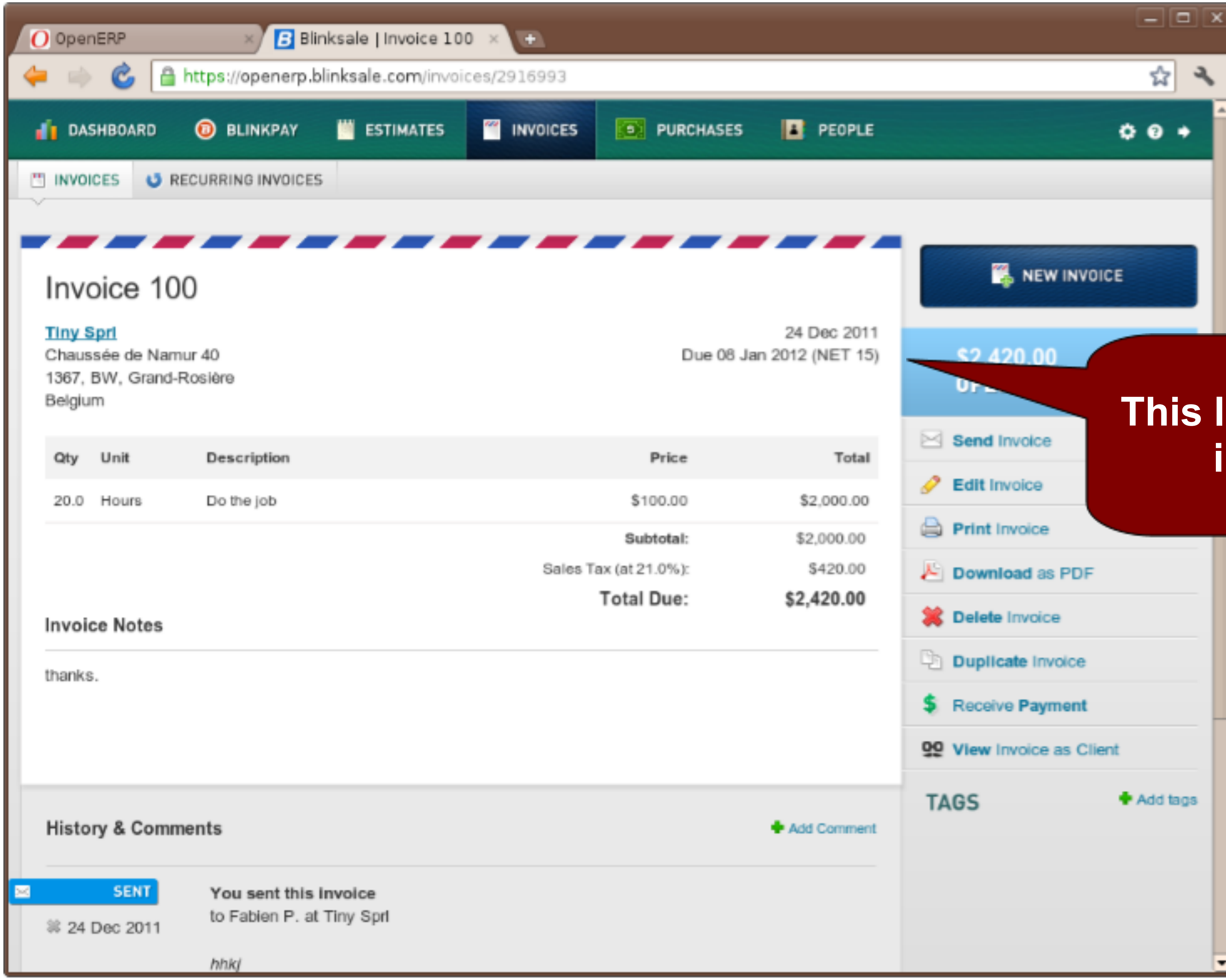
- Kanban is sexy. To improve:
  - Edit fields in kanban directly to avoid switching to form (same for PAGE view)
  - Use flexible HTML kanban features:
    - SO Lines (subtotals, comment, separators, ...)
    - Mail / Status change history on opportunities (ala LP)
    - some lists can be replaced by kanban, exemple what we did in v6.1

Forms should look like paper docs

- An invoice form in OpenERP should look like a paper invoice ! (page: perfectly, form: nearly)
- Example: a many2one address field should look this (multi-lines):
  - Chaussée de Namur 40
  - 1367 Grand-Rosière
  - Belgium
- Review O2M Sale Order lines:
  - Inline editing ?

→ Test quickbooks, they are good on this !

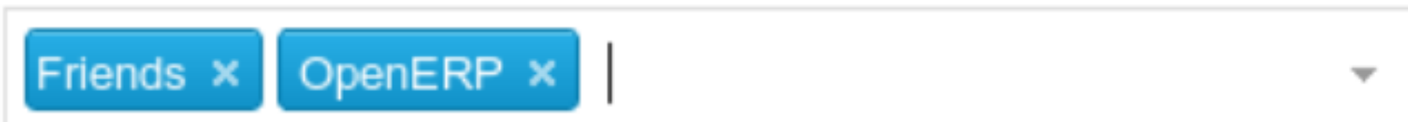
Similar to paper version



This looks like an invoice.

Many2Many

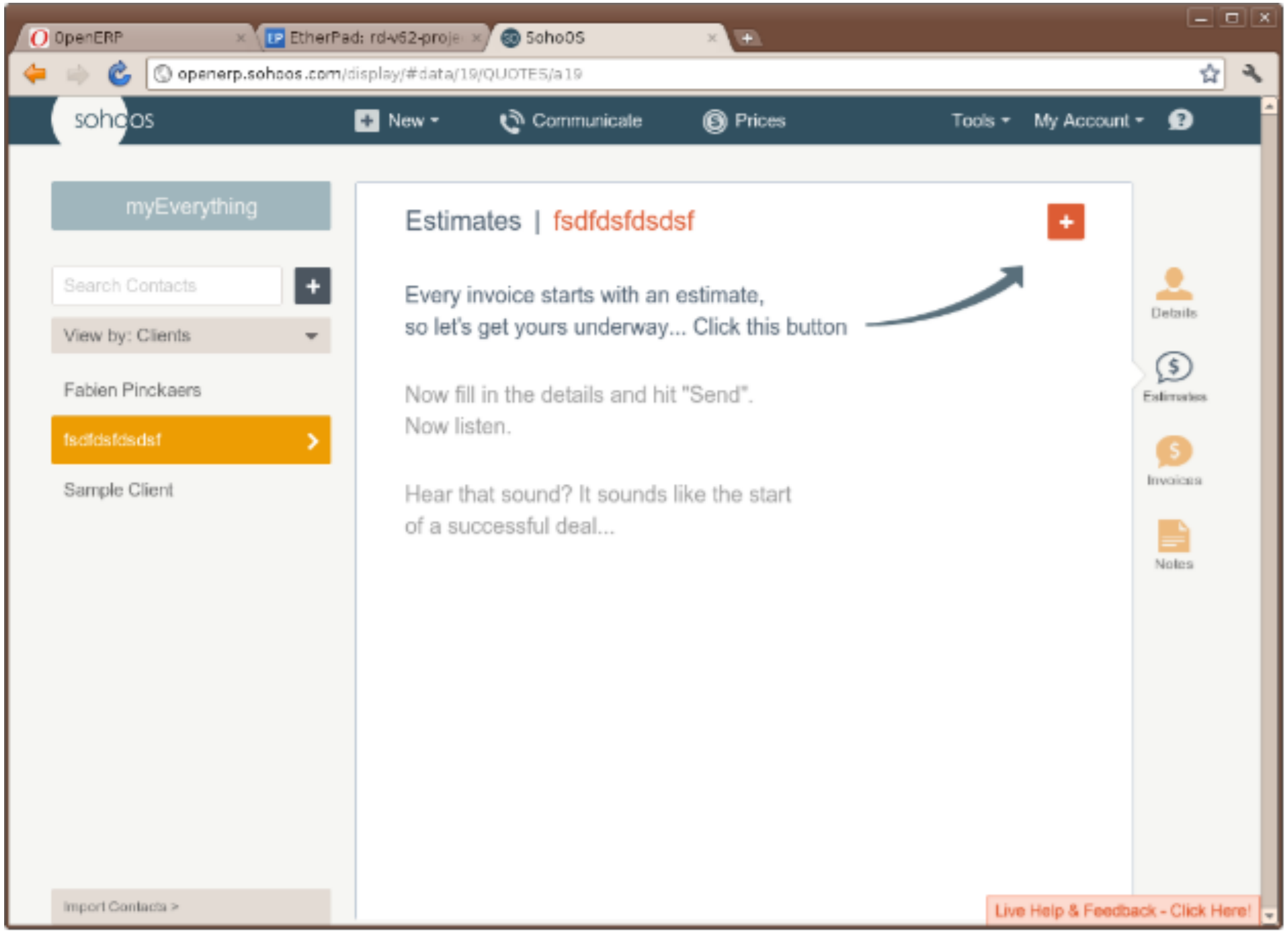
- Should be like a many2one with tags inside.



- Exemples:
  - Taxes on invoice lines
    - Will allow many2many in editable lists.
  - Categories on partners

No Document, cool view

Empty lists must display an instructive message on how to proceed. → good replacement for our current menutips.



Dashboards & Reports

- We need a root menu “Reporting” instead of having every application that creates his own reporting menu?

- What about putting all dashboards and reports in a separate applications ?
  - Most users do not use reports & dashboards
  - When you need statistics, you go to dashboard first
  - Most users do groupby in the view they use (Opportunities) instead of going to a separate section "Opportunities Analysis"
- Same for configuration → move all apps configuration to Settings menu?

Default Search

Default Filters Ideas

- Having filters on states that are checked by default (draft, open) is:
  - Good: I don't want to see canceled pickings
  - But confusing:
    - some users click “clear” before searching as it's too complex to think what filter should I add and which one should I remove. → having a “clear” button on our search dialog is not normal, it's asign of a misconception
    - Some users do not find a document because it was in a search by default

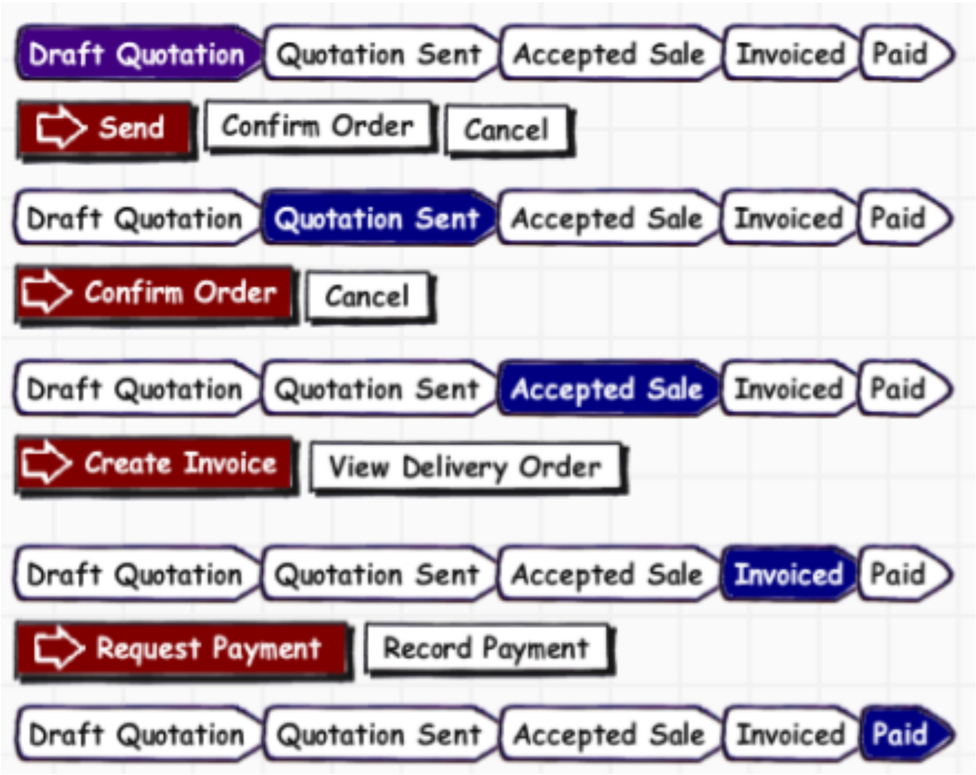
Default Filters Improvements

- **No pre-set filters on state fields:**
  - Remove default filters like "New, Open, Todo" from most list views but display all records
    - Eg: Most "done" delivery orders are on page 2 → so they do not polute the result. We can display all to avoid misunderstandings (same for invoices, so, ... I don't care too much if there is a cancelled document in the list)
  - Keep default filters for Kanban views:
    - I don't want to see Done/Cancelled tasks in my kanban of tasks in a project.
  - This would allow to remove the clear button!
- **Keep pre-set filters for unactive/templates:**
  - Keep unactive employees/product/...
  - Add filter buttons for "Adding" not "Substracting": Instead of having "Active" checked by default, add Inactive or "Archive" which is unchecked.

Better Workflow

Review main flows

- More business oriented:
  - You do not want to print a quotation → you want to send it to the customer (you may need to print it to do so, or email)
  - Sending a quotation to customer IS a step in the process
  - Done is not clear → Paid is better
- ONE (and only one) button must mark clearly the NEXT action to avoid the user to think (what should I do now?)



Review main workflows

- We need to review workflows of:
    - Sale Order
    - Purchase Order
    - Invoices
    - Payments?
    - Timesheet Sheets

Misc ideas

-
- In SO, add an action “Deliver products” (button and state)
- Main features in the same level of menu, example, lead, opportunities, meeting, customers, ...

Draft of Mockups

Sales Projects Human Resources Reporting Settings Fabien Pinckaers V

Activities

Customer: [ ]

Salesman: [ ]

Filter

- Leads
- Customers
- Meetings
- Opportunities
- Sales Orders

> Phone Calls

v Invoicing

- Deliveries to Inv
- Contracts to Renew
- Sales to Invoice

Write notes and reminders

Post

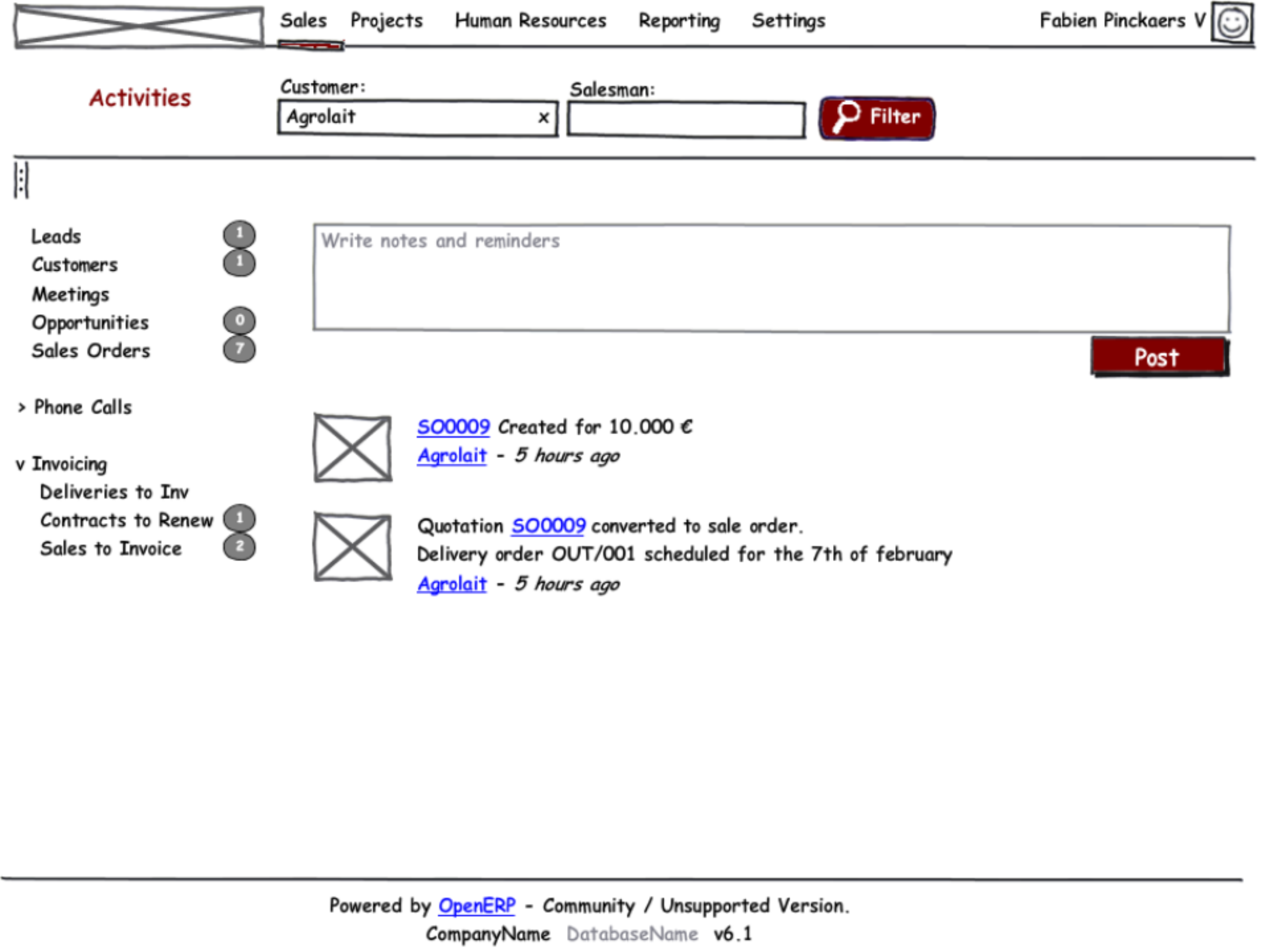
SO0009 Created for 10.000 €
Agrolait - *5 hours ago*

Quotation SO0009 converted to sale order.
Delivery order OUT/001 scheduled for the 7th of february
Agrolait - *5 hours ago*

Received a phone call from Agrolait:
They want to have a meeting with Christine
Fabien Pinckaers - *Dec 26, 2011 20:12*

The User Logs In

- No dashboard anymore
  - Just a “Wall” ala facebook with latest activities on the sale application
- Global search on top
- Search → Filter
- Header height highly reduced
- No more Reporting & Configuration submenus
  - Reporting as a standalone application
  - Configuration moved to Settings
- No right top toolbar icons (home, preferences)
  - Replaced by a fold menu ala Google.


Sales
Projects
Human Resources
Reporting
Settings
Fabien Pinckaers V
Activities
Customer:
Agrolait
Salesman:
Filter
Leads 1
Customers 1
Meetings
Opportunities 0
Sales Orders 7
> Phone Calls
v Invoicing
Deliveries to Inv
Contracts to Renew 1
Sales to Invoice 2
Write notes and reminders
Post
SO0009 Created for 10.000 €
Agrolait - 5 hours ago
Quotation SO0009 converted to sale order.
Delivery order OUT/001 scheduled for the 7th of february
Agrolait - 5 hours ago
Powered by OpenERP - Community / Unsupported Version.
CompanyName DatabaseName v6.1

It filters on a customer

- When you search on customer:
  - It applies to current list view but also on all menus
  - You directly see the number of documents related to this customer: sales orders, contracts to renew, opportunities, ...
- No more “clear” button as there is no more default searches
- A many2one search field has a cross to quickly unfilter on this field

Sales Projects Human Resources Reporting Settings Fabien Pinckaers V

Sales Orders

Draft Open Pending Customer: Agrolait × Reference: advanced... Filter

Create

<< < 1/5-56 > >>

- Leads 1
- Customers 1
- Meetings
- Opportunities 0
- Sales Orders 7

> Phone Calls

v Invoicing

- Deliveries to Inv
- Contracts to Renew 1
- Sales to Invoice 2

	Reference^	Date	Customer	Salesman	Total	State
☐	SO0006	21/01/2012	Agrolait	Nicolas	34567 €	Quotation
☐	SO0005	12/01/2012	Agrolait	Nicolas	12000 €	To Invoice
☐	SO0002	01/01/2012	Agrolait	Bernard	4000 €	Cancelled
☐	SO0006	21/01/2012	Agrolait	Nicolas	34567 €	Quotation
☐	SO0005	12/01/2012	Agrolait	Nicolas	12000 €	To Invoice
☐	SO0002	01/01/2012	Agrolait	Bernard	4000 €	Quotation
☐	SO0002	01/01/2012	Agrolait	Bernard	4000 €	Quotation

Export Import Workflow View

Powered by OpenERP - Community / Unsupported Version.

CompanyName DatabaseName v6.1

I click on Sale Order

- No pencil to edit → go on page view first
- No pre-filters set by default (Open,...)
- Import, Export, Workflow, View Editor → in the bottom as it does no depends on the selection
- No cross to delete → select a record first
- Very identifiable "Create" button
- Less switch view icons → no page, form. Only list/kanban
- No "Group By", "Extended", Custom Filters → Everything moved the the advanced folding...
- No Currency collumn → merged in the price
- Less fields (only 6 columns)

Sales Projects Human Resources Reporting Settings Fabien Pinckaers V

Sales Orders

Draft Open Pending

Customer: Agrolait ×

Reference:

advanced...

Filter

Create

<< < 1/5-56 > >>

- Leads 1
- Customers 1
- Meetings
- Opportunities 0
- Sales Orders 7

> Phone Calls

v Invoicing
- Deliveries to Inv
- Contracts to Renew 1
- Sales to Invoice 2

☐	Reference^	Date	Customer	Salesman	Total	State
☐	SO0006	21/01/2012	Agrolait	Nicolas	34567 €	Quotation
☑	SO0005	12/01/2012	Agrolait	Nicolas	12000 €	To Invoice
☑	SO0002	01/01/2012	Agrolait	Bernard	4000 €	Cancelled
☐	SO0006	21/01/2012	Agrolait	Nicolas	34567 €	Quotation
☐	SO0005	12/01/2012	Agrolait	Nicolas	12000 €	To Invoice
☐	SO0002	01/01/2012	Agrolait	Bernard	4000 €	Quotation
☐	SO0002	01/01/2012	Agrolait	Bernard	4000 €	Quotation

- Edit
- Download as PDF
- Merge Orders
- Delete

Export Import

Workflow View

- All actions on a record on the same place:
  - Edit, Delete,
  - Print, Merge, ...

Sales Projects Human Resources Reporting Settings Fabien Pinckaers V

Sales Orders

Draft Open Pending

Customer: NewCustomer ×

Reference:

advanced...

Filter

Create

- Leads 1
- Customers 1
- Meetings
- Opportunities 2
- Sales Orders 0

> Phone Calls

v Invoicing
- Deliveries to Inv
- Contracts to Renew 0
- Sales to Invoice 0

Every sale order starts with a quotation.

Once the quotation is validated, it's automatically converted into a sale order to follow the delivery and invoicing.

Hear that sound? It sounds like the start of a successfull deal...

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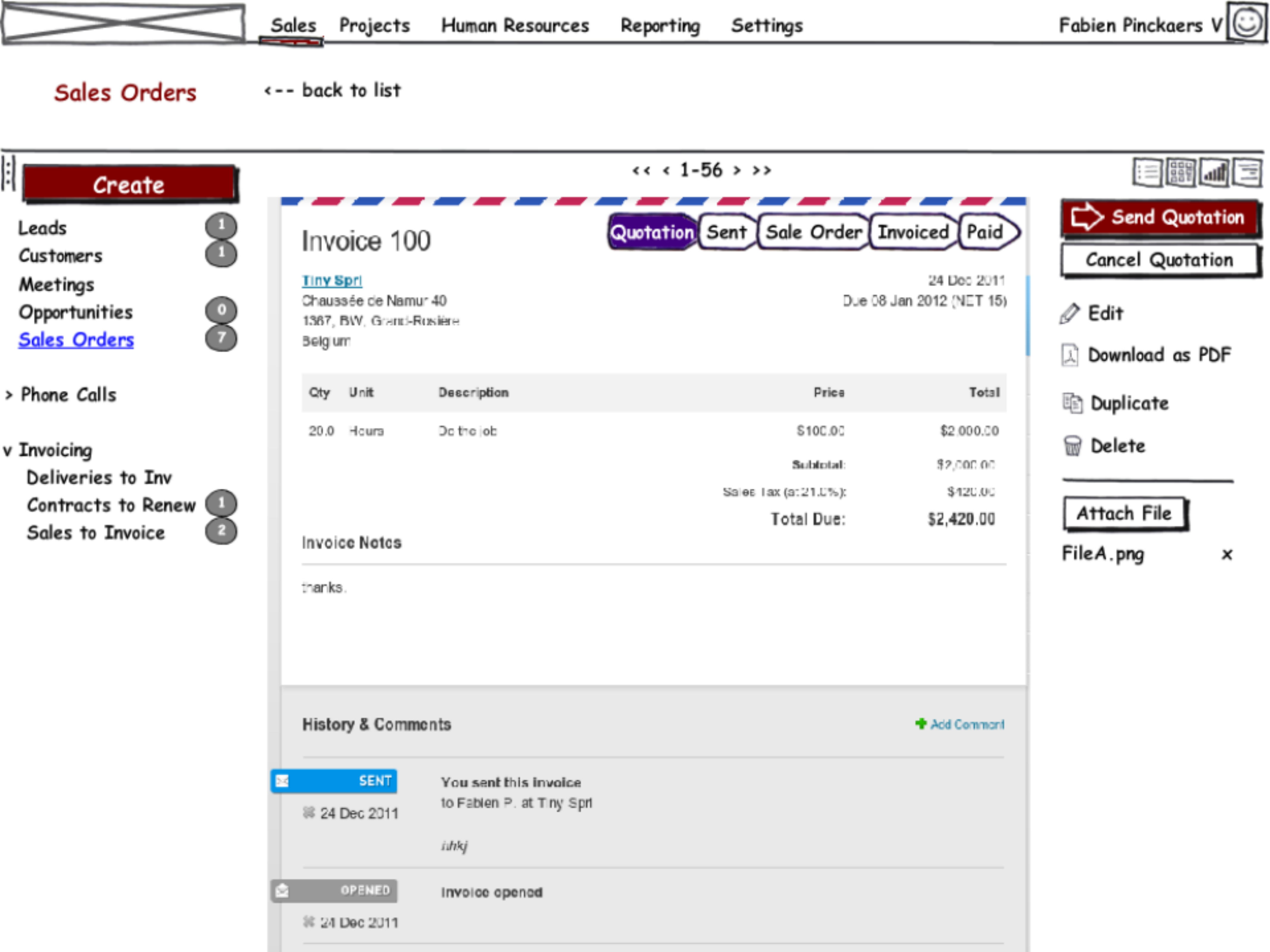
CompanyName DatabaseName v6.1

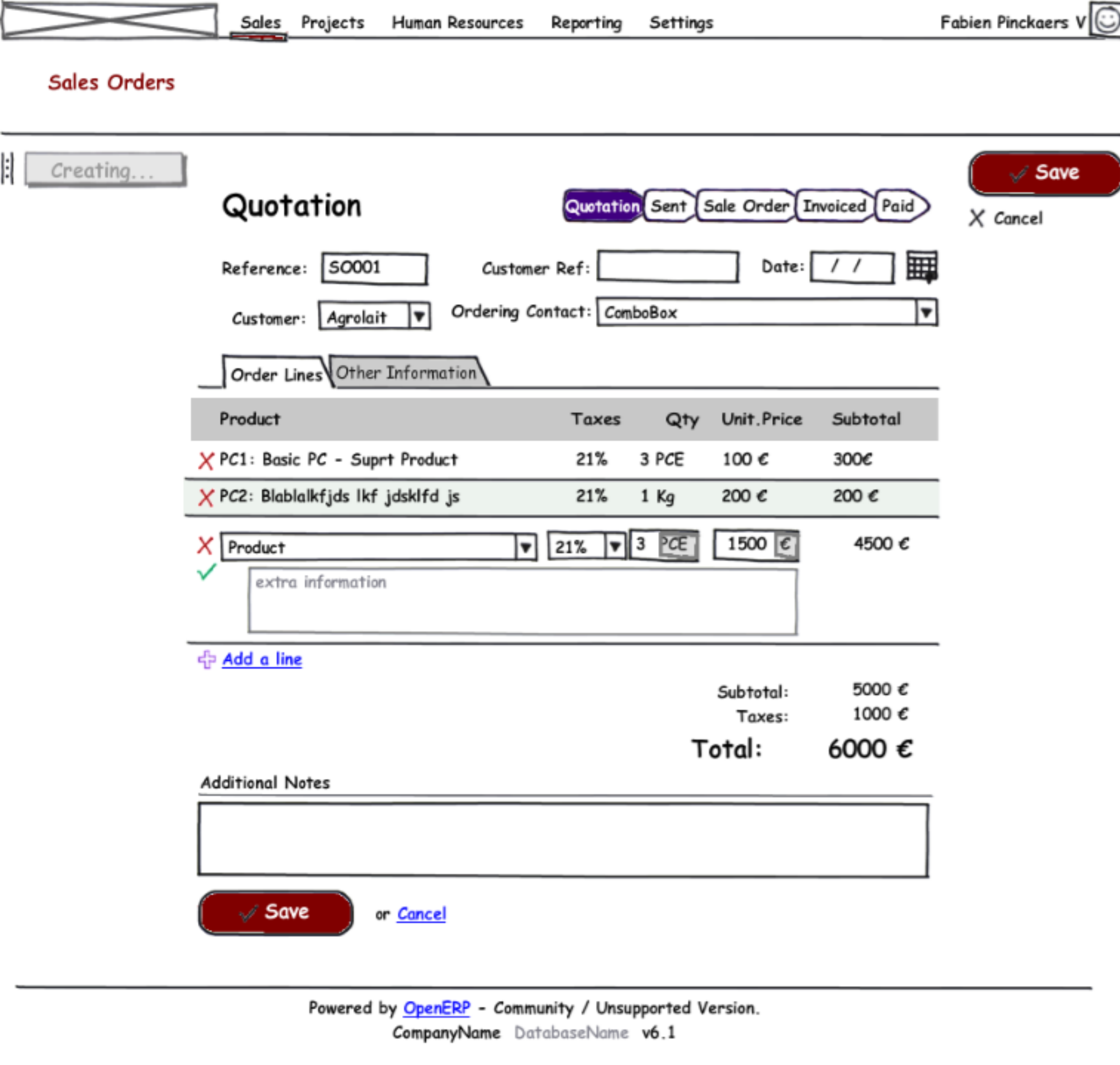
Empty lists

- Empty lists explains the user what to do.
- We train him.
  - It's probably the first time he goes to this screen


Sales
Projects
Human Resources
Reporting
Settings
Fabien Pinckaers V
Sales Orders
<-- back to list
Create
<< < 1-56 > >>
Leads 1
Customers 1
Meetings
Opportunities 0
Sales Orders 7
> Phone Calls
v Invoicing
Deliveries to Inv
Contracts to Renew 1
Sales to Invoice 2
Invoice 100
Quotation
Sent
Sale Order
Invoiced
Paid
Tiny Sprl
Chaussée de Namur 40
1367, BW, Grand-Rosière
Belgium
24 Dec 2011
Due 08 Jan 2012 (NET 15)
Qty
Unit
Description
Price
Total
20.0
Hours
Do the job
$100.00
$2,000.00
Subtotal:
$2,000.00
Sales Tax (at 21.0%):
$420.00
Total Due:
$2,420.00
Invoice Notes
thanks.
History & Comments
Add Comment
SENT
24 Dec 2011
You sent this invoice
to Fabien P. at Tiny Sprl
ihhkj
OPENED
24 Dec 2011
Invoice opened
Send Quotation
Cancel Quotation
Edit
Download as PDF
Duplicate
Delete
Attach File
FileA.png
x

I click to see a document: page

- Separation of the document itself, that looks like a paper doc and extra info (history of changes)
- State progress bar on the top, with better steps
- ← back to list / or search bar?
- Action bar:
  - The next step is highlighted: Send Quotation
  - All action button on the same place


Sales
Projects
Human Resources
Reporting
Settings
Fabien Pinckaers V
Sales Orders
Creating...
Save
Cancel
Quotation
Quotation
Sent
Sale Order
Invoiced
Paid
Reference: SO001
Customer Ref:
Date: / /
Customer: Agrolait
Ordering Contact: ComboBox
Order Lines
Other Information
Product
Taxes
Qty
Unit.Price
Subtotal
PC1: Basic PC - Suprt Product 21% 3 PCE 100 € 300€
PC2: Blablalkfjds lkf jdsklfd js 21% 1 Kg 200 € 200 €
Product
21%
3 PCE
1500 €
4500 €
extra information
Add a line
Subtotal: 5000 €
Taxes: 1000 €
Total: 6000 €
Additional Notes
Save
or Cancel
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CompanyName DatabaseName v6.1

Editable Form

- Improvement on the editable list (or editable kanban)?
- No other button than “Save” or “cancel”
- Focus on the “Save” button
- After clicking on “Save”, you are redirected to the next slide

Sales | Projects | Human Resources | Reporting | Settings | Fabien Pinckaers V

Sales Orders

<--- back to list

Create

- Leads 1
- Customers 1
- Meetings
- Opportunities 0
- Sales Orders 7

> Phone Calls

v Invoicing
- Deliveries to Inv
- Contracts to Renew 1
- Sales to Invoice 2

<< < 1-56 > >>

Quotation | Sent | Sale Order | Invoiced | Paid

Invoice 100

Tiny Sprl
Chaussée de Namur 40
1367, BW, Grand-Rosière
Belgium

24 Dec 2011
Due 08 Jan 2012 (NET 15)

Qty	Unit	Description	Price	Total
20.0	Hours	Do the job	$100.00	$2,000.00
			Subtotal:	$2,000.00
			Sales Tax (at 21.0%):	$420.00
			Total Due:	**$2,420.00**

Invoice Notes

thanks.

History & Comments

+ Add Comment

SENT
24 Dec 2011
You sent this invoice
to Fabien P. at Tiny Sprl
ihkj

OPENED
24 Dec 2011
Invoice opened

Send Quotation
Cancel Quotation
Edit
Download as PDF
Duplicate
Delete

Attach File
FileA.png x