

Odoo 9 New Design: Usability Methodology

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What's Usability about?

Learnability

How easy is it for users to accomplish basic tasks the first time they encounter the interface?

Efficiency*

Once users have learned the interface, how quickly can they perform tasks?

Memorability

When users return to the interface after a long period of not using it, how easily can they re-establish proficiency?

Errors

How many errors do users make, how severe are these errors, and how easily can they recover from the errors?

Satisfaction

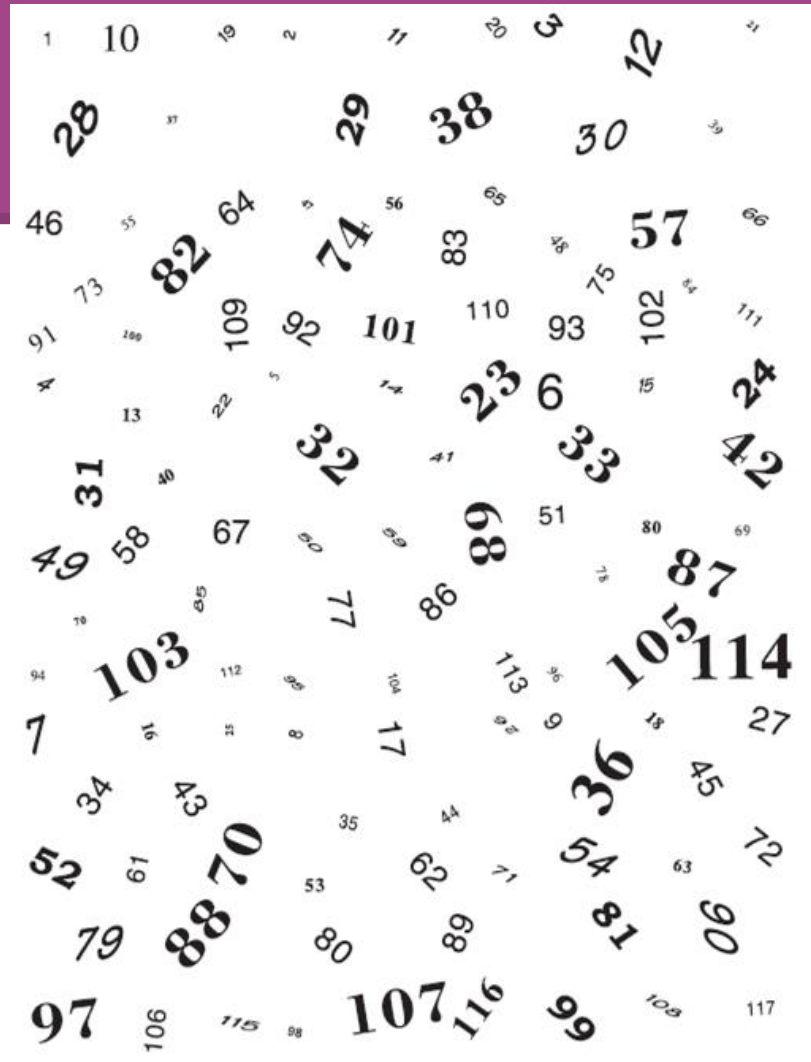
How pleasant is it to use the interface?

* Probably the most important for an ERP.

Example

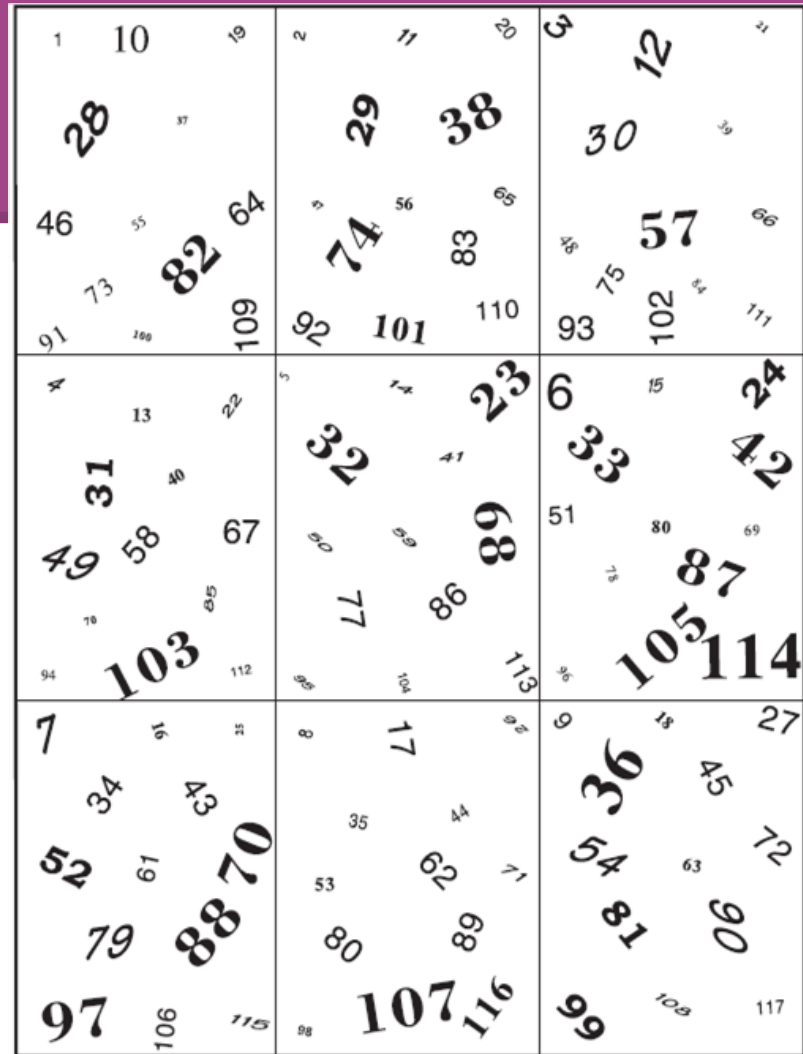
Try to find the numbers
from 1 to 10, in the
correct order.

You have 10 seconds.

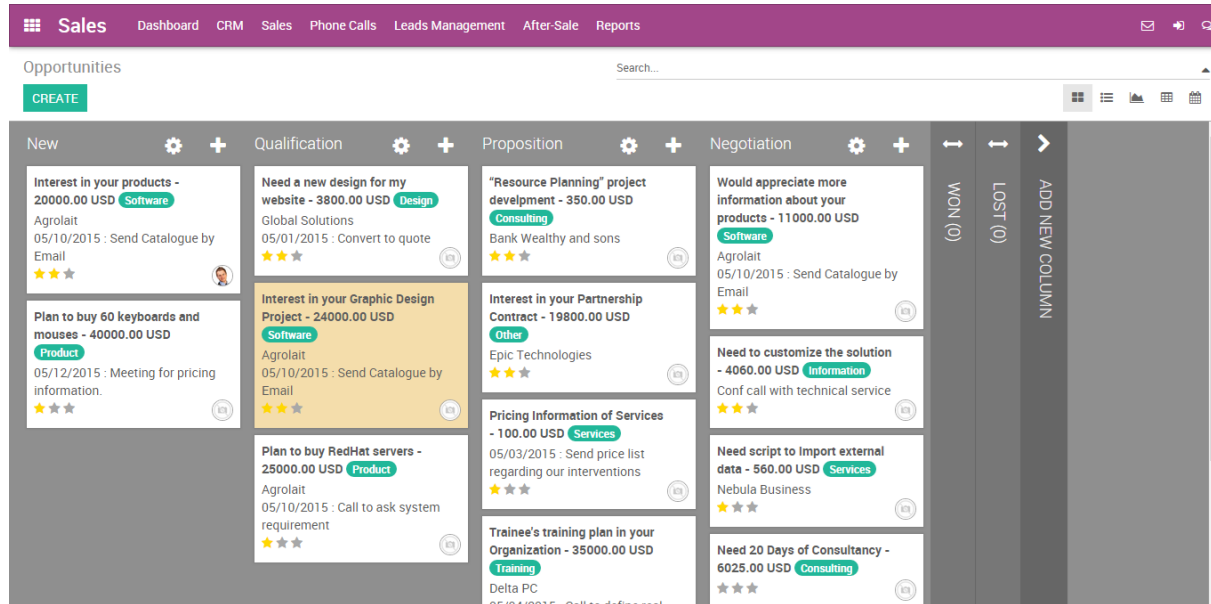


Example

Same exercise.



Changing to Material Design



What are the effects?

BIG increase in Satisfaction.

But, minimal improvement on:

Learnability

Efficiency

Memorability

Errors

So, how to improve learnability, efficiency, memorability and errors in Odoo?

By adding some basic usability tools into your development process.

Typical development process



User needs

Decision matrix

Target users

User scenarios

Benchmarks

Prototypes

Iterative design

Tester profiles

Test scenarios

KPIs & metrics

Quality surveys

User needs

Charles

44 y.o, owner of a SME

- Knows his basic Sales jargon (understand what is a lead, an opportunity etc.)
- Has briefly used another CRM software before (familiar with the concepts of stages, probability, forecast etc.)
- Currently uses a Notepad, Excel file and Email client to manage his sales; one of his key objectives is to have everything in one place.
- Often on the road or at a customer's place, so mobile is paramount for him.

WHAT?

The list of the Project's Objectives, sorted by priority.

WHY?

So that all decisions are taken with the Project Objectives in mind.

Target users



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WHAT?

Small and matter-of-fact description of your future user.

WHY?

So all the people working on the project have a tangible idea of who the end-users really is.

User scenarios

A sales representative:

- Distribute his business cards at a fair, then manages incoming requests in his email client.
- Wants to manages his sales by stages. So he creates different folders in his email client.
- Wants to estimate future revenues, and uses an Excel file with custom calculations.
- Manages each communication independently (messages by email, meetings in calendar, phone by mobile)

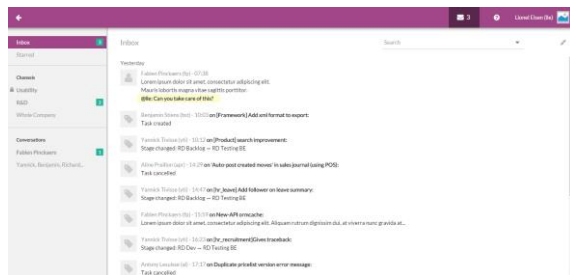
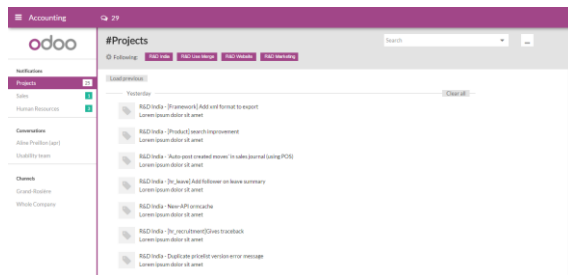
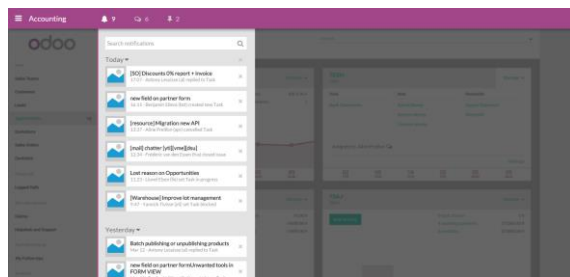
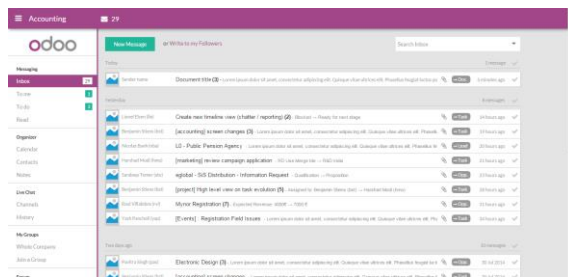
WHAT?

Short descriptions of the user's current tasks.

WHY?

To understand the As Is (current situation) versus To Be (proposed solution, represented by the test scenarios)

Prototypes



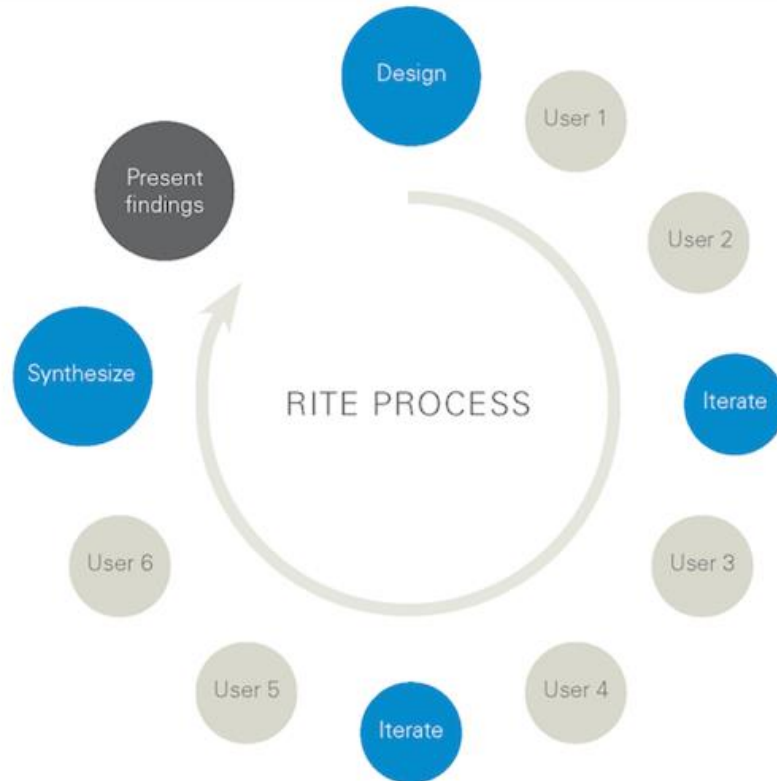
WHAT?

Dynamic simulations of the future interfaces, without care for the code behind it.

WHY?

To be able to test and iterate before actually developing the product.

Iterative design



WHAT?

Ask a person to do a quick task on your interface.

Apply a correction if they fail, then repeat.

WHY?

To detect early conception mistakes / improve product onboarding

Test scenarios

A sales representative:

- Distribute his business cards at a fair, then manages the leads created automatically by email.
- Follows a structured sales method with clear stages and a good overview of all ongoing opportunities.
- Switches to Graph view and immediately see Expected Revenues by Stage
- Logs a history by customer of all his meetings, calls, discussions and documents sent.

WHAT?

Short descriptions of the user's future tasks.

WHY?

To represent the To Be, and evaluate the new solution with accurate tasks.

As Is / To Be comparison

As Is scenario

Distribute his business cards / flyers at a fair.
Manages incoming requests in his Email client

Manages his sales with an improvised system (ex: different folders in Email client)

Wants to estimate future revenues, uses an Excel file with custom calculations

Manages each communication independently (messages by email, meetings in calendar, phone by mobile)

To Be scenario

Distribute his business cards at a fair, then manages the leads created automatically by Email.

Follows a structured sales method with clear stages and a good overview of all ongoing opportunities

Switches to Graph view and immediately see Expected Revenues by Stage

Logs a history in Odoo of all his meetings, calls, discussions and documents sent.

Quality surveys

The Post-Study Usability Questionnaire Version 3		Strongly agree							Strongly disagree		NA
		1	2	3	4	5	6	7			
1	Overall, I am satisfied with how easy it is to use this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
2	It was simple to use this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
3	I was able to complete the tasks and scenarios quickly using this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
4	I felt comfortable using this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
5	It was easy to learn to use this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
6	I believe I could become productive quickly using this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
7	The system gave error messages that clearly told me how to fix problems.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
8	Whenever I made a mistake using the system, I could recover easily and quickly.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
9	The information (such as online help, on-screen messages and other documentation) provided with this system was clear.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
10	It was easy to find the information I needed.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
11	The information was effective in helping me complete the tasks and scenarios.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
12	The organization of information on the system screens was clear.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
13	The interface* of this system was pleasant.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
14	I liked using the interface of this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
15	This system has all the functions and capabilities I expect it to have.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
16	Overall, I am satisfied with this system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

*The "interface" includes those items that you use to interact with the system. For example, some components of the interface are the keyboard, the mouse, the microphone, and the screens (including their graphics and language).

WHAT?

A short and simple questionnaire.

WHY?

So you can measure user's satisfaction (and eventually gather improvement suggestions by contacting them directly)

Typical development process



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Quality surveys

Thank You!

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