odoo

UX best practices to create your module

Usability Team

odoo

Topics

1. Usability guidelines
2. Onboarding
3. Which view ?
4. User interface elements
5. Wizards and modals
6. How do I know I’m ready to publish my module ? Testing

odoo

Usability guidelines

Usability Guidelines

Usability Guidelines

Objectives :

1. Focus on the end user needs.

Usability Guidelines

Objectives :

1. Focus on the end user needs.

2. User Experience : think the features as a flow, not a single functionality (fully integrated)

Usability Guidelines

Objectives :

1. Focus on the end user needs.

2. User Experience : think the features as a flow, not a single functionality (fully integrated)

3. Ergonomics and intuitive interface: having the same philosophy in the whole eco-system (colors, where do I put a button,...), easy to learn

Usability Guidelines

Keep in mind :

1. For each screen that is designed, think about the general flow

Usability Guidelines

Keep in mind :

1. For each screen that is designed, think about the general flow

2. How would you rate the user experience ? Why ?

Usability Guidelines

Keep in mind :

1. For each screen that is designed, think about the general flow

2. How would you rate the user experience ? Why ?

3. Do not invent new concepts, use the ones that are already known by the average user.

Usability Guidelines

Ask yourself :

1. What is the purpose of my development ?

Usability Guidelines

Ask yourself :

1. What is the purpose of my development ?

2. At first, don't think about technical limitation

Usability Guidelines

Ask yourself :

1. What is the purpose of my development ?

2. At first, don't think about technical limitation

3. Would a non-educated person be able to use what you are developing ?

Usability Guidelines

Ask yourself :

1. What is the purpose of my development ?
2. At first, don't think about technical limitation
3. Would a non-educated person be able to use what you are developing ?
4. Is this button/field necessary ?

Usability Guidelines

Ask yourself :

1. What is the purpose of my development ?
2. At first, don't think about technical limitation
3. Would a non-educated person be able to use what you are developing ?
4. Is this button/field necessary ?
5. Is the business process smooth ? If not, what breaks the flow ?

Usability Guidelines

The 5 pillars of Usability :

Usability Guidelines

The 5 pillars of Usability :

1. Learnability

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

Usability Guidelines

The 5 pillars of Usability :

1. Learnability

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

2. Efficiency

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

Usability Guidelines

The 5 pillars of Usability :

1. Learnability

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

2. Efficiency

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

3. Memorability

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

Usability Guidelines

The 5 pillars of Usability :

1. Learnability

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

2. Efficiency

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

3. Memorability

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

4. Errors

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

Usability Guidelines

The 5 pillars of Usability :

1. Learnability

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

2. Efficiency

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

3. Memorability

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

4. Errors

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

5. Satisfaction

   How pleasant is it to use the design ?

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what
3. Conventions are your friends

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what
3. Conventions are your friends
4. Make it obvious what's clickable

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what
3. Conventions are your friends
4. Make it obvious what's clickable
5. Omit needless words

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what
3. Conventions are your friends
4. Make it obvious what's clickable
5. Omit needless words
6. Use Breadcrumbs

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what
3. Conventions are your friends
4. Make it obvious what's clickable
5. Omit needless words
6. Use Breadcrumbs
7. Don't think about a specific point but think about the process

Simple Usability Rules

Key Ideas :

1. Avoid things that make us think.
2. Create a clear visual hierarchy
   a. The more important, the more prominent
   b. Related things are visually related
   c. Nested things to show what's part of what
3. Conventions are your friends
4. Make it obvious what's clickable
5. Omit needless words
6. Use Breadcrumbs
7. Don't think about a specific point but think about the process
8. But pay attention to details !

odoo

Onboarding

Onboarding

- It is the user’s first steps (15 first minutes)

Onboarding

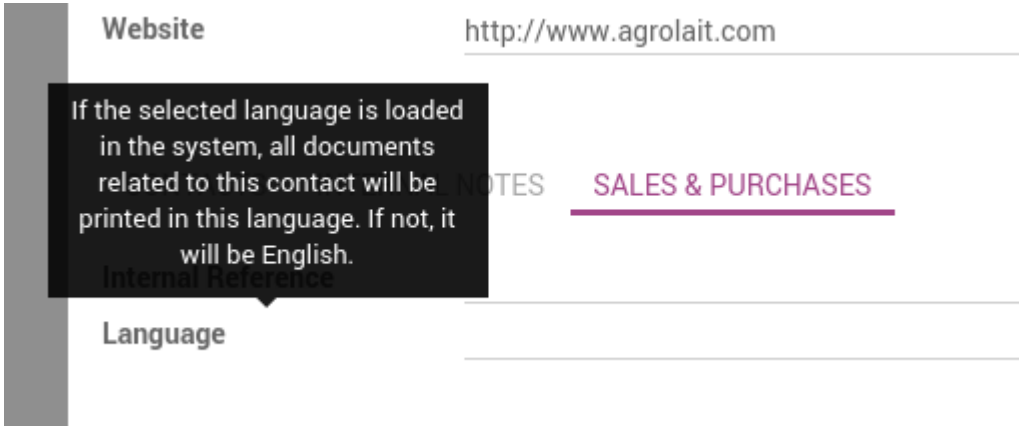
- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert

Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?

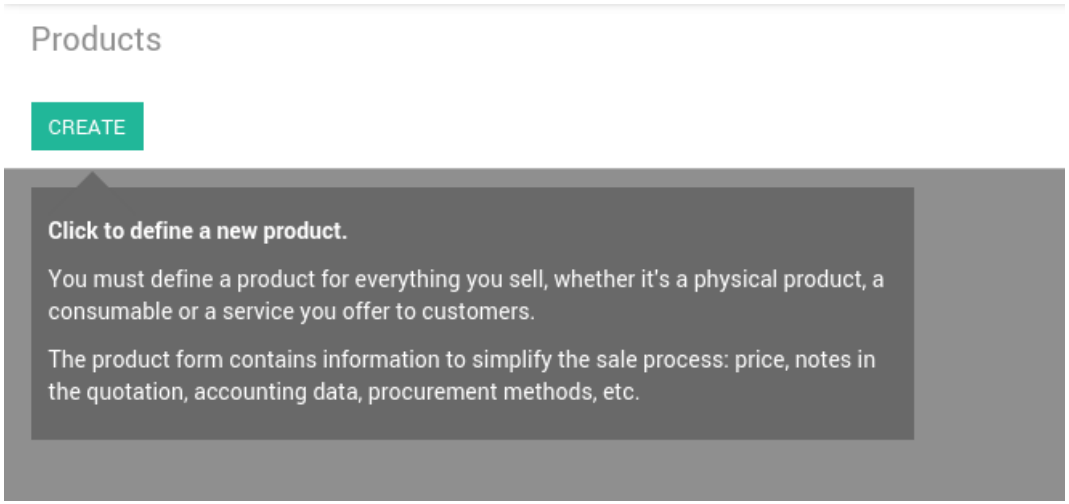
Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip



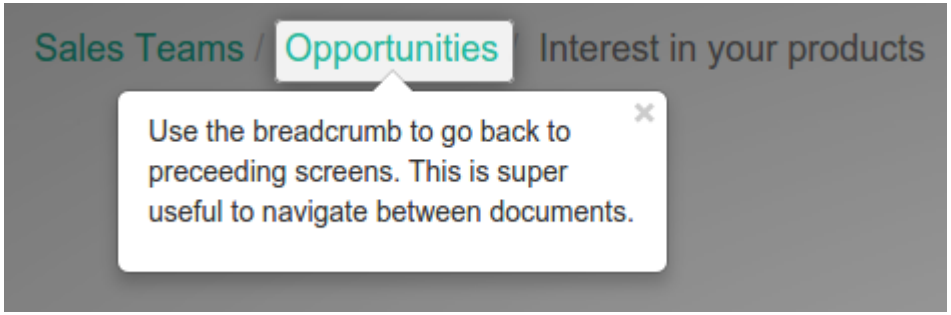
Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip
  - Menu tip



Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip
  - Menu tip
  - Popup tips

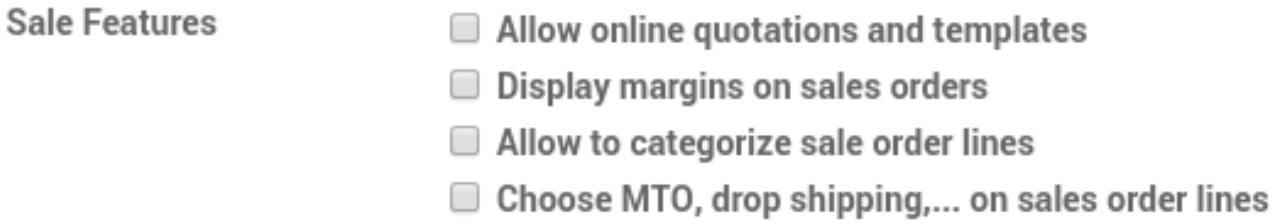


Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip
  - Menu tip
  - Popup tips
  - Placeholders

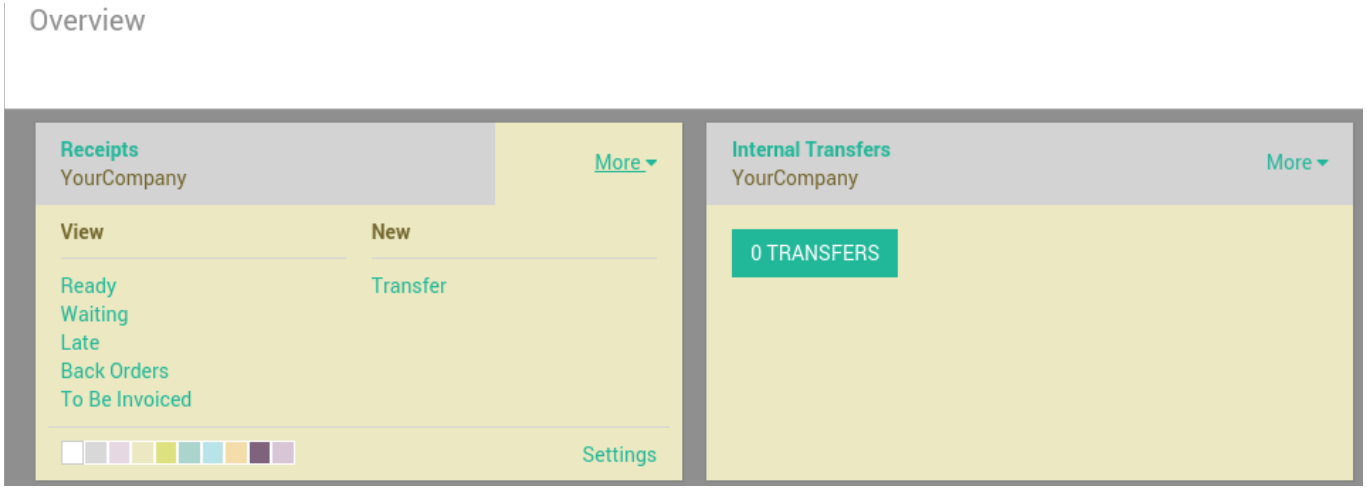
Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip
  - Menu tip
  - Popup tips
  - Placeholders
- Think of the main business cases. If particular cases : put it as an option in the settings or in customizing.



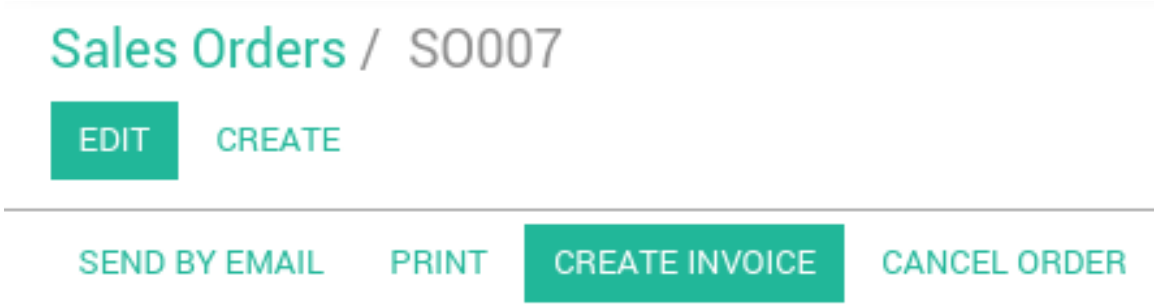
Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip
  - Menu tip
  - Popup tips
  - Placeholders
- Think of the main business cases. If particular cases : put it as an option in the settings or in customizing.
- Jump to the right menu, The user must directly be in the context where he will work everyday



Onboarding

- It is the user's first steps (15 first minutes)
- Be able to do it smoothly without being an expert
- What if I want to introduce a complex concept ?
  - Tooltip
  - Menu tip
  - Popup tips
  - Placeholders
- Think of the main business cases. If particular cases : put it as an option in the settings or in customizing.
- Jump to the right menu, The user must directly be in the context where he will work everyday
- Guide the user by highlighting buttons (next step = colored button)

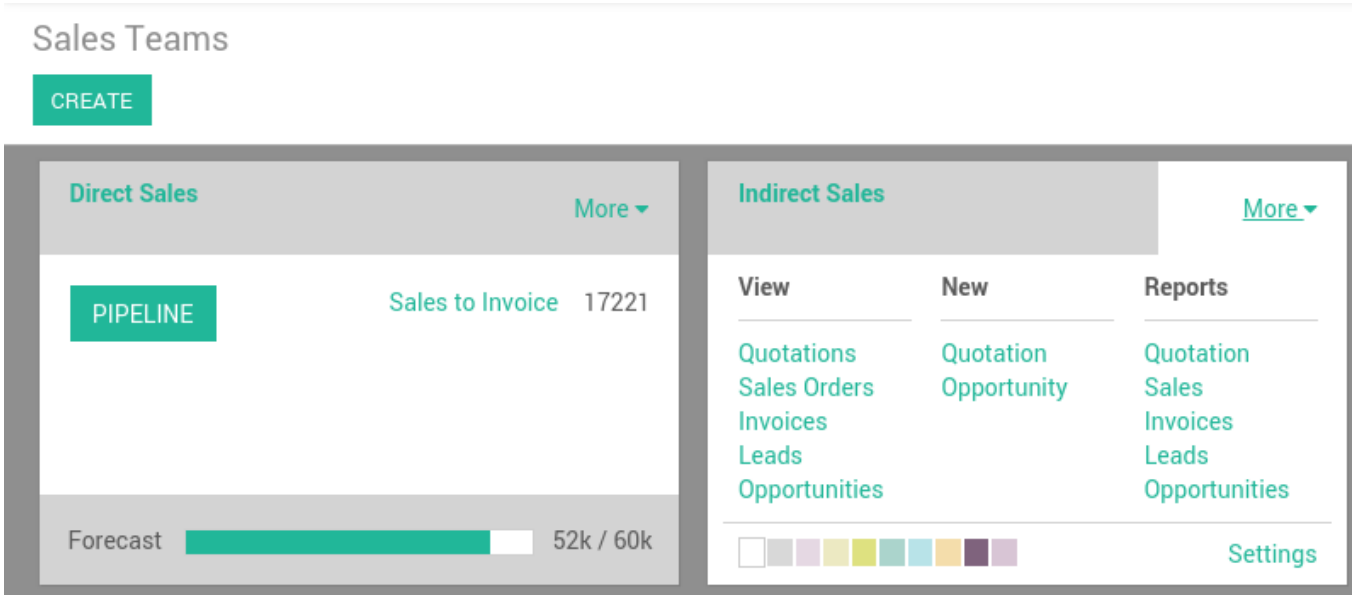


odoo

View selection

Which View

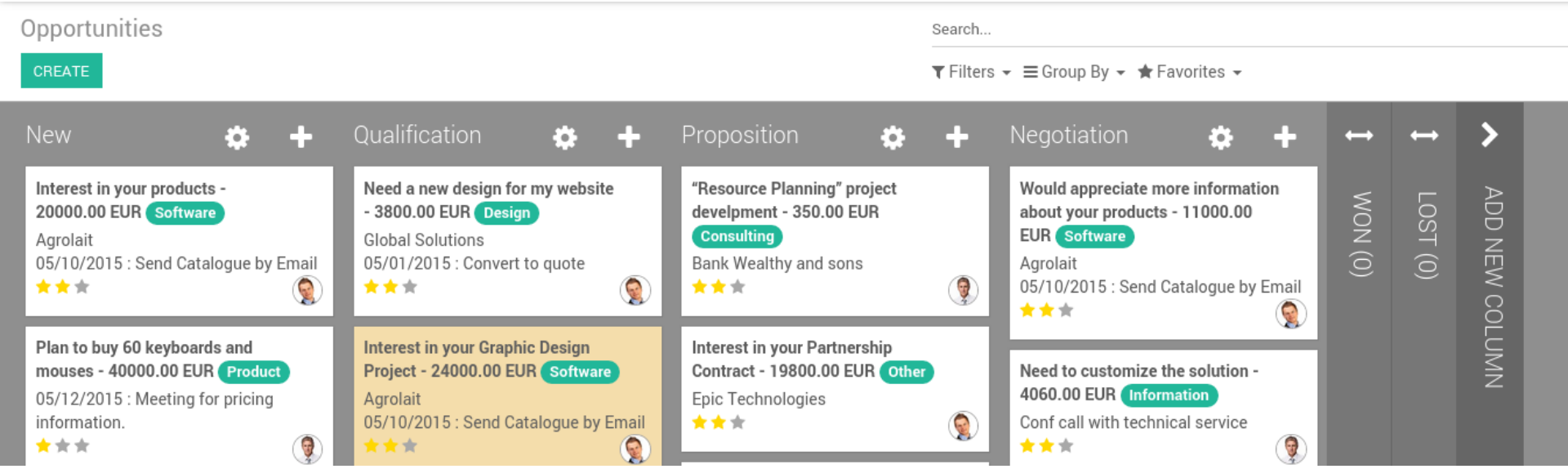
Use a gallery for context (project, sales team, …)



Which View

Use a kanban if a business process is used for this feature (e.g. opportunities)

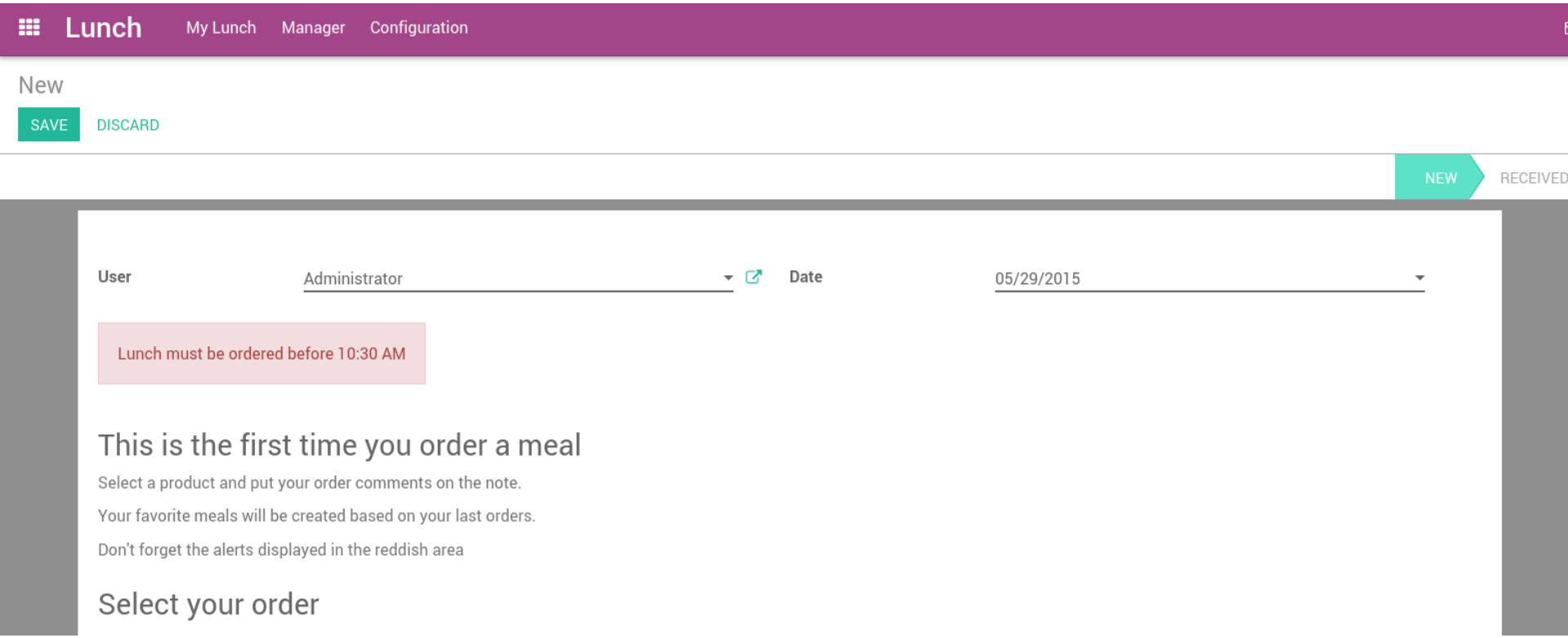
- show columns in background
- let the quick create available



Which View

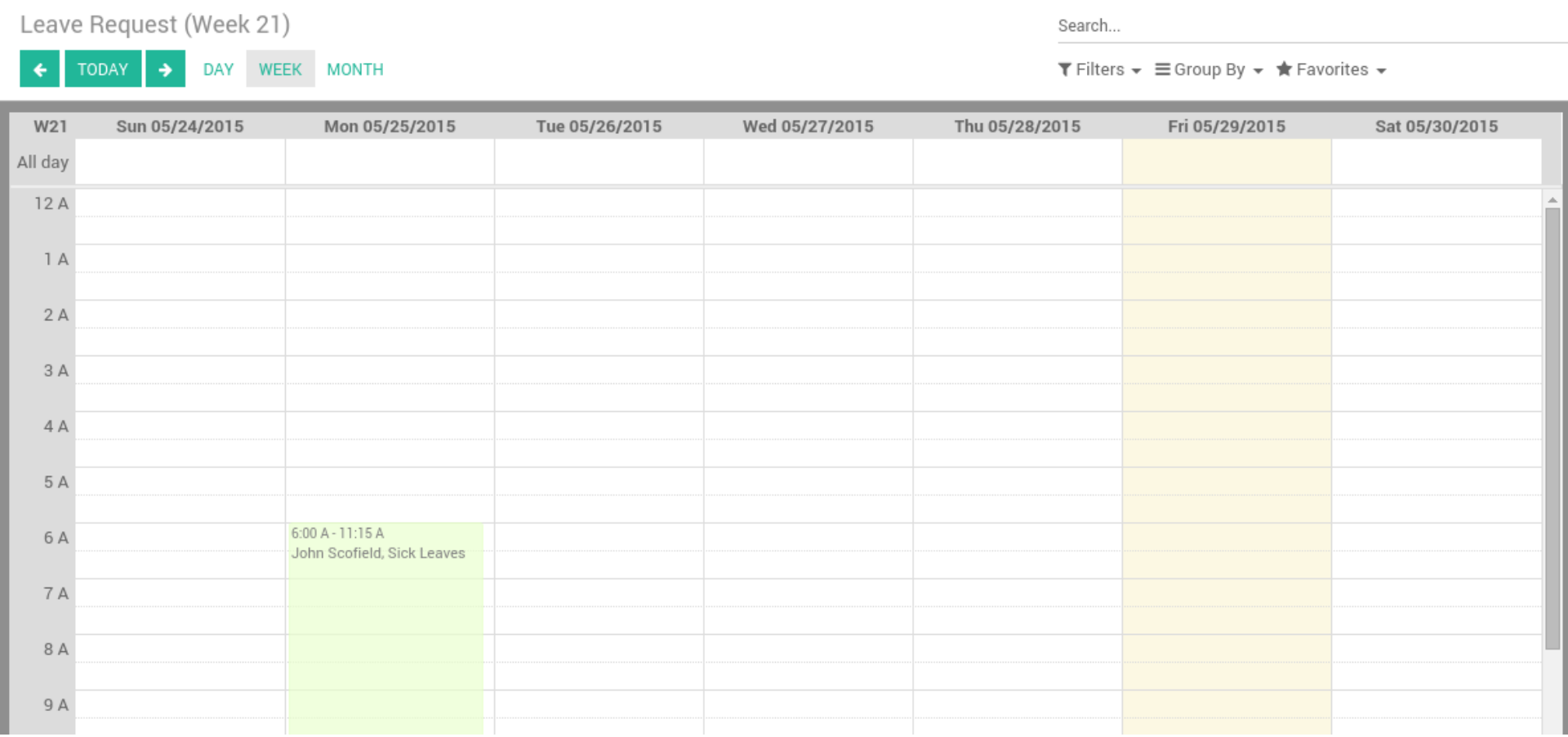
Use exceptionally a <u>form</u> if the everyday use is a one click need (e.g, order a lunch)

- the user has to click in one button and then it is done neither more nor less
- The form view should be as close as possible from the real business document (e.g. a sale order)
- Use less field as possible. Other info should be precompleted by default value
- Hide secondary fields in an option or in tabs



Which View

Use a calendar view if you want to link an object to a date or a period.



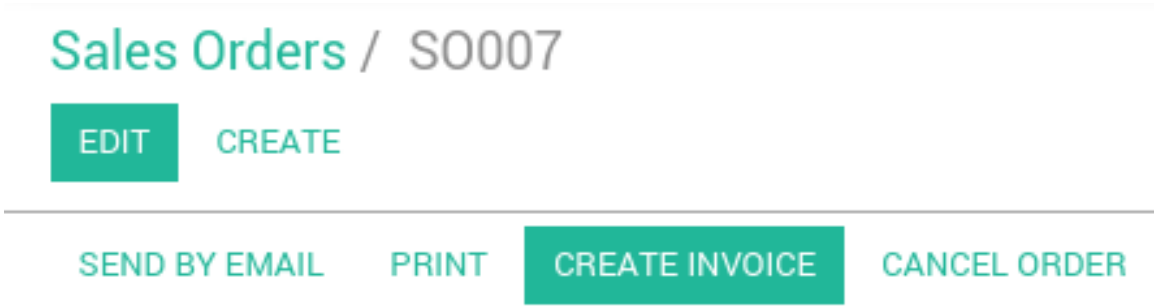
odoo

UI Elements

User interface elements

Buttons

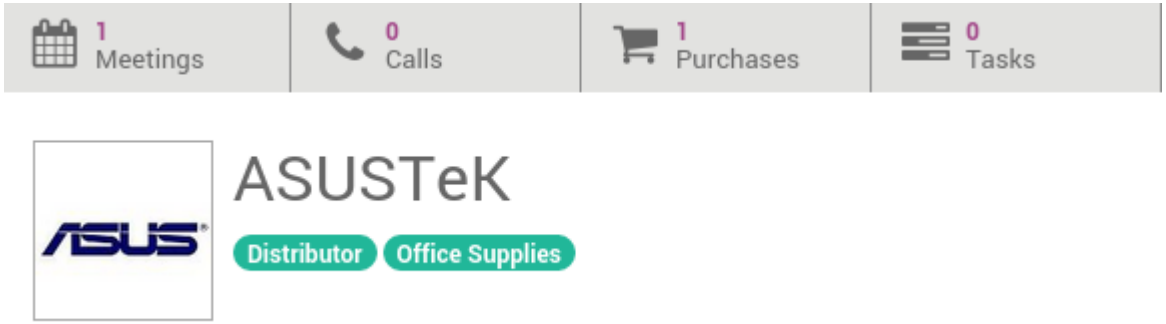
- Action button



User interface elements

Buttons

- Action button
- Stat button



User interface elements

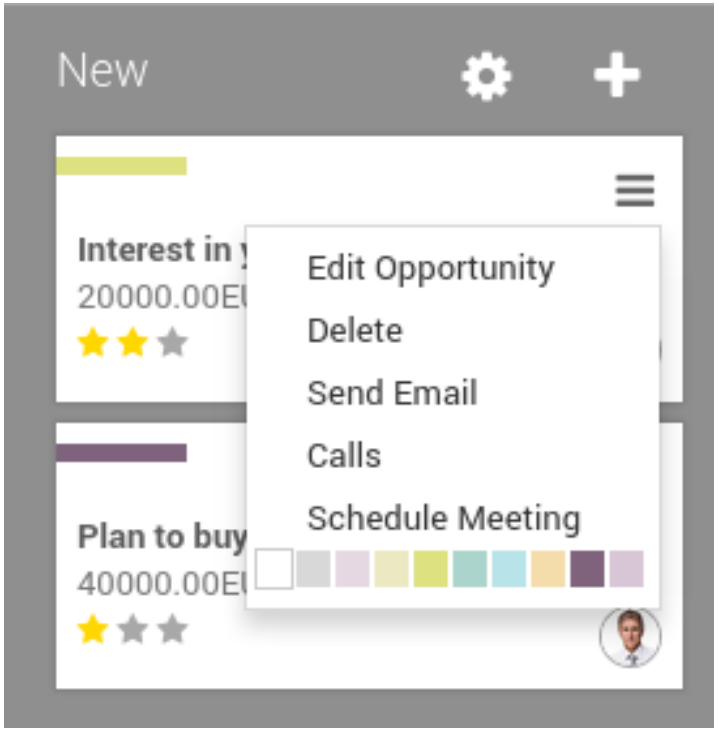
Buttons

- Action button
- Stat button
- Stage buttons

User interface elements

Buttons

- Action button
- Stat button
- Stage buttons
- Hamburger



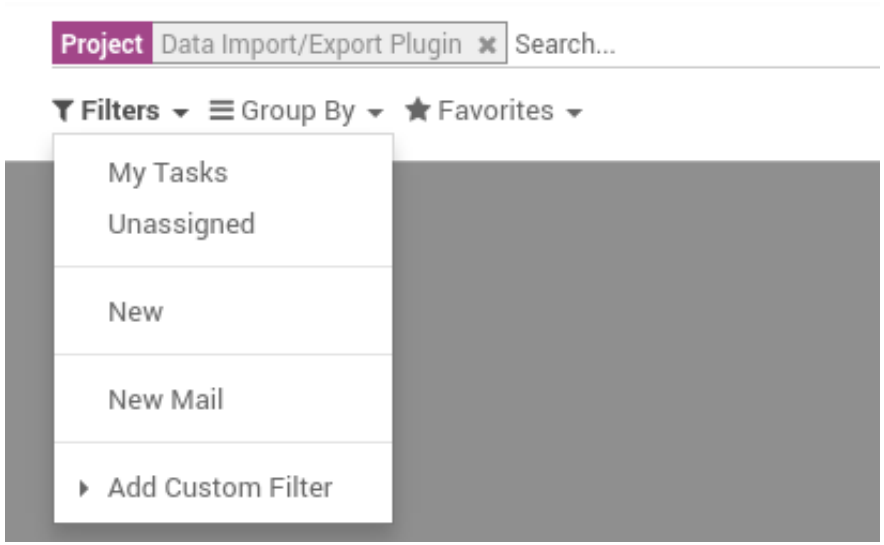
User interface elements

Buttons

- Action button
- Stat button
- Stage buttons
- Hamburger

Search field

- Filters



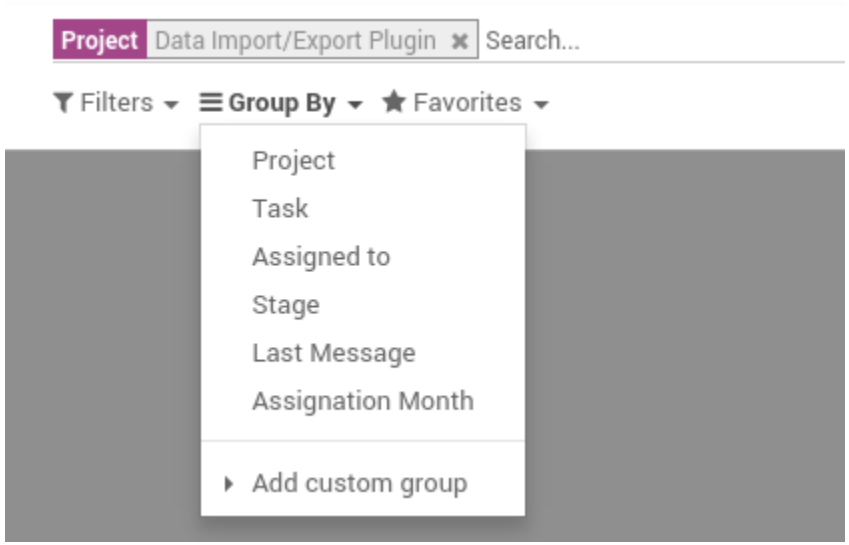
User interface elements

Buttons

- Action button
- Stat button
- Stage buttons
- Hamburger

Search field

- Filters
- Group by



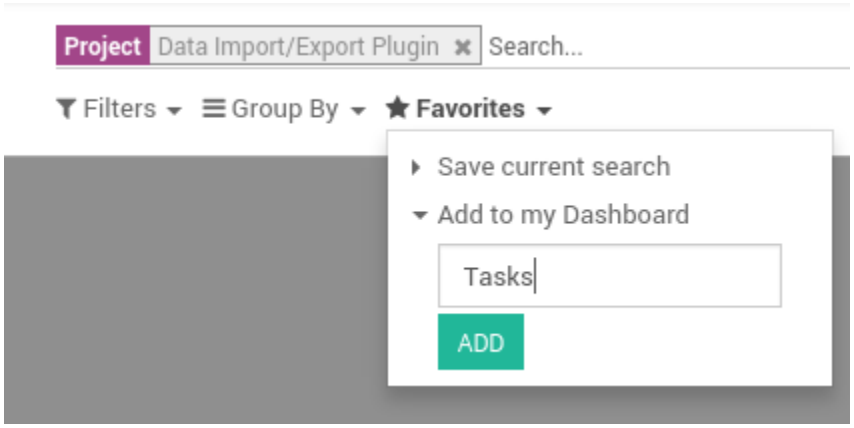
User interface elements

Buttons

- Action button
- Stat button
- Stage buttons
- Hamburger

Search field

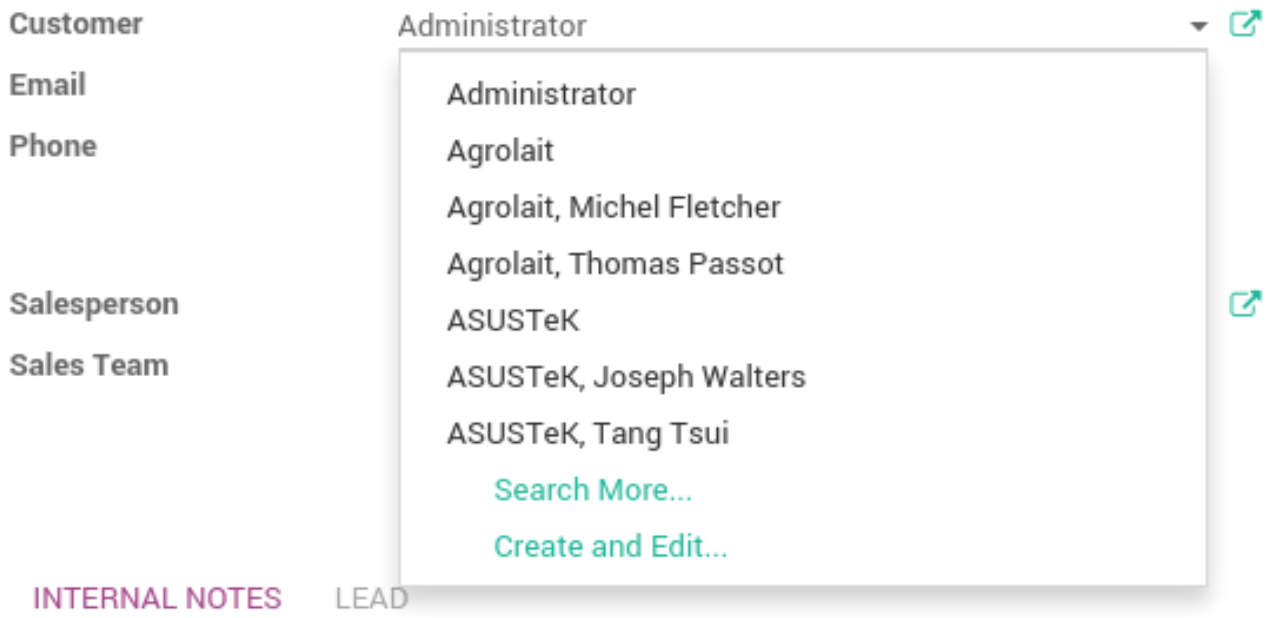
- Filters
- Group by
- Favorites



User interface elements

Fields

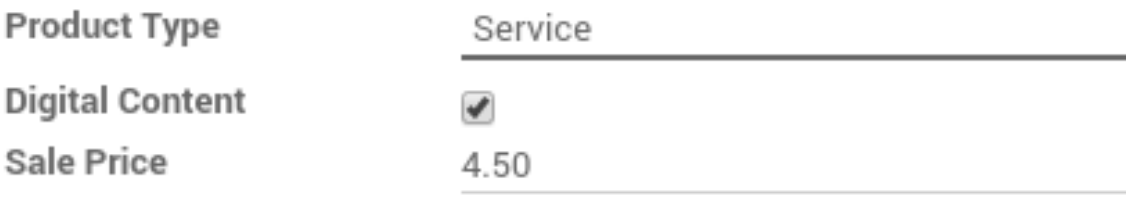
- selection



User interface elements

Fields

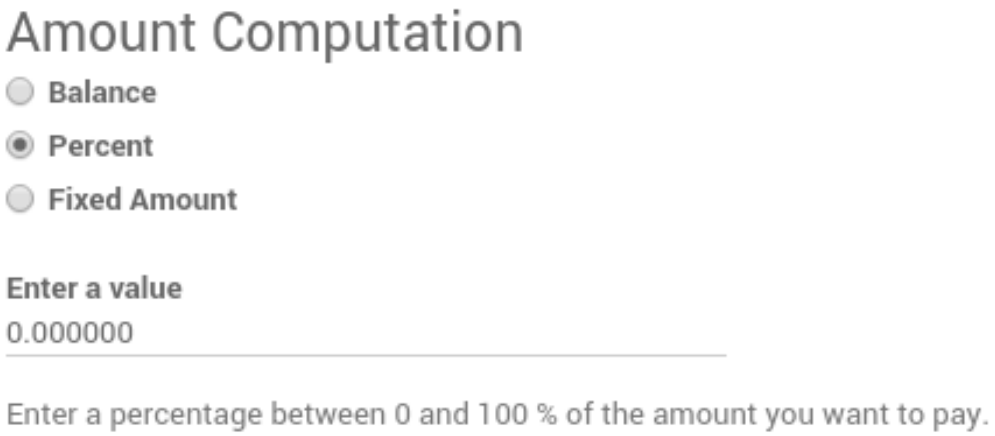
- selection
- checkbox



User interface elements

Fields

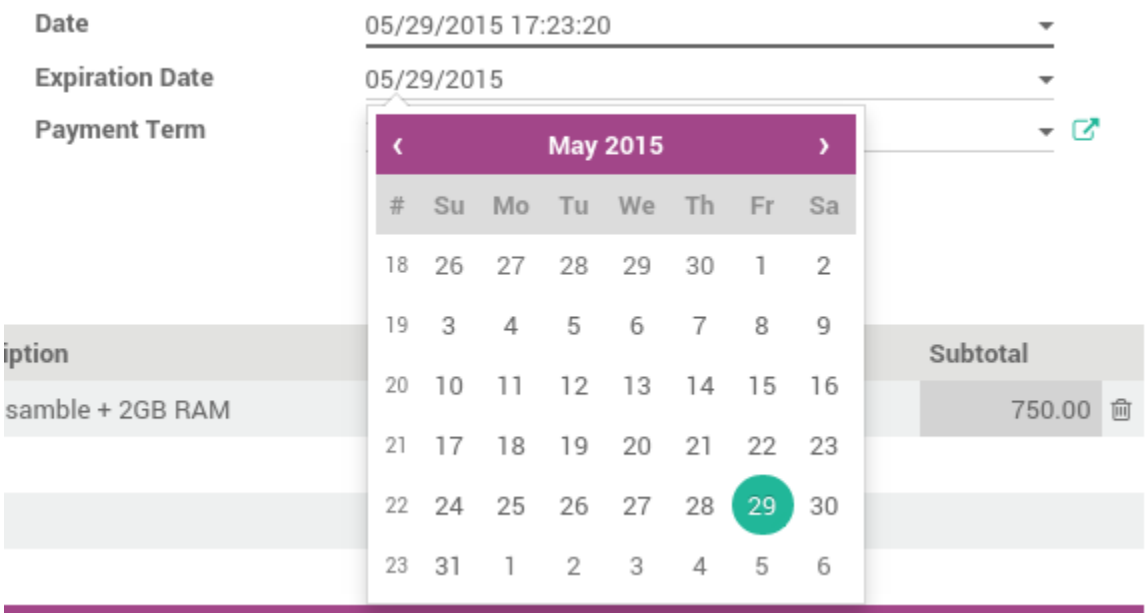
- selection
- checkbox
- radio button



User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker



User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker
- toggle

User interface elements

Fields

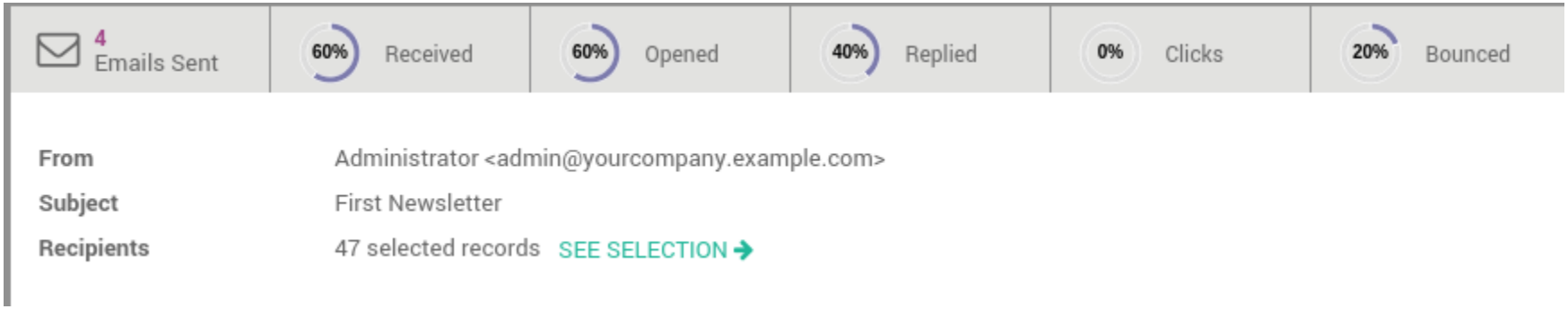
- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary

Untaxed Amount :	14981.00€
Taxes :	0.00€
Total :	**14981.00€**

User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary
- percentpie

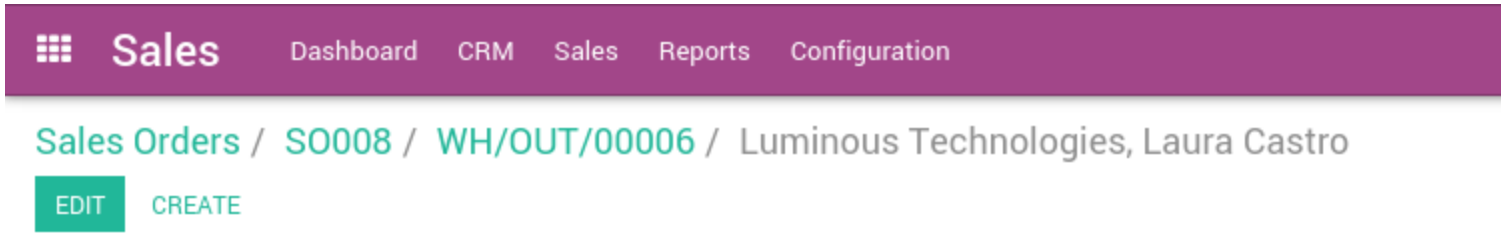


User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary
- percentpie

Breadcrumb



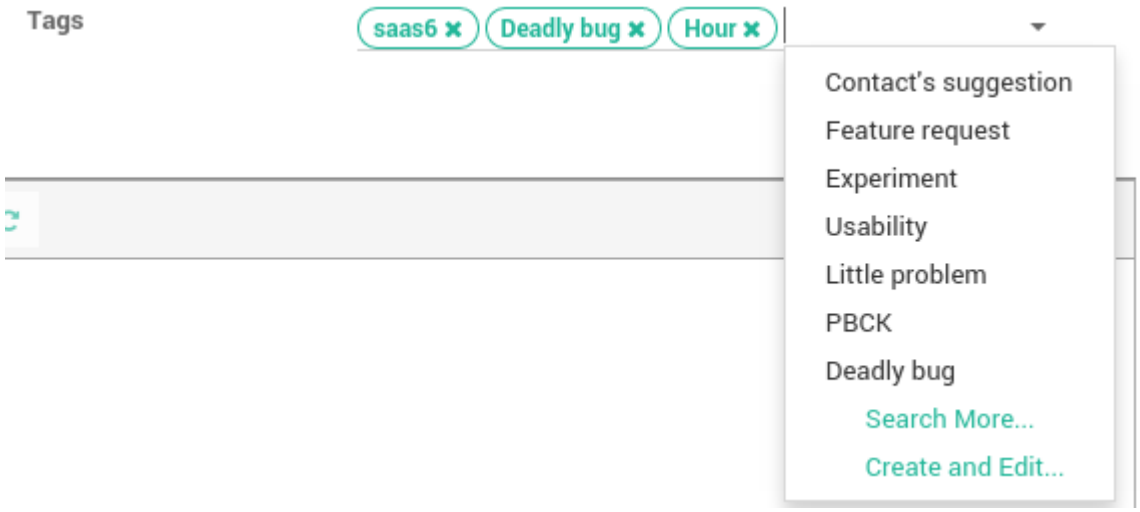
User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary
- percentpie

Breadcrumb

Tags



User interface elements

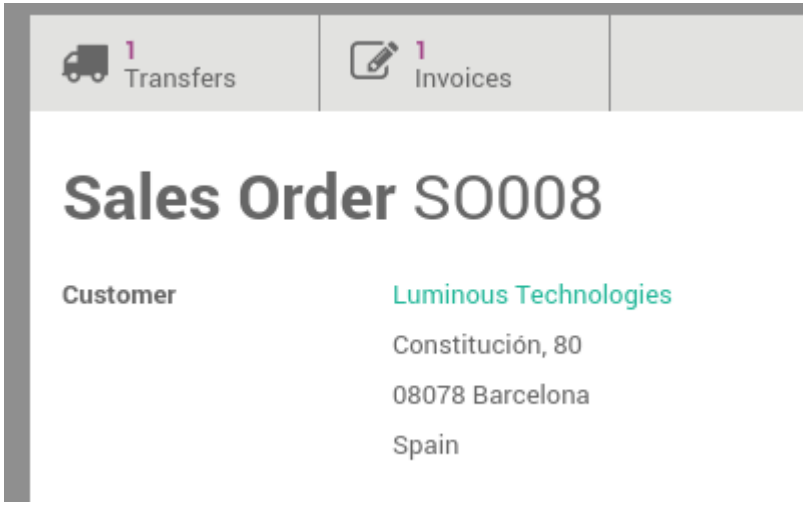
Fields

- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary
- percentpie

Breadcrumb

Tags

Icons



User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary
- percentpie

Breadcrumb

Tags

Icons

User interface elements

Fields

- selection
- checkbox
- radio button
- datepicker
- toggle
- monetary
- percentpie

Breadcrumb

Tags

Icons

Additional Info : http://www.usability.gov/how-to-and-tools/methods/user-interface-elements.html

odoo

Wizards and Modals

Wizards and modals

- Try not to use it. Only if necessary. It breaks the flow and isn't mobile responsive.
- Wizard is for usually for advanced process
  - Thinking of 2 processes : one simple and one complicated
  - Option to flag in customize or settings
- Modals : Try to avoid it, unless there are too many information.
  - In list : it is better to use editable list than opening a modal

odoo

How do I know I’m ready to publish my module ?

How do I know I'm ready ?

- Testing :

How do I know I'm ready ?

- Testing :
  - In new databases

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated
  - The module alone & in a running instance

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated
  - The module alone & in a running instance
  - Pay attention to the access rights

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated
  - The module alone & in a running instance
  - Pay attention to the access rights
  - Do the flow, but also test it randomly (error messages should be clear)

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated
  - The module alone & in a running instance
  - Pay attention to the access rights
  - Do the flow, but also test it randomly (error messages should be clear)
  - Test it on the main browsers

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated
  - The module alone & in a running instance
  - Pay attention to the access rights
  - Do the flow, but also test it randomly (error messages should be clear)
  - Test it on the main browsers
- Focus on the main processes, not on the 1% case (except if you develop something really specific)

How do I know I'm ready ?

- Testing :
  - In new databases
  - In database already populated
  - The module alone & in a running instance
  - Pay attention to the access rights
  - Do the flow, but also test it randomly (error messages should be clear)
  - Test it on the main browsers
- Focus on the main processes, not on the 1% case (except if you develop something really specific)
- Be coherent with the other Odoo applications. Use the conventions we have.