



Usability Guide Lines  
OpenERP v6.0



# Introduction

- ✓ **This presentation shows improvements proposed for v6.0. We made it to help developers learn the best usability practices, in order to develop clean screens.**
- ✓ **Our main goal is to make OpenERP easier to use, to install and configure.**

# Contents of this presentation

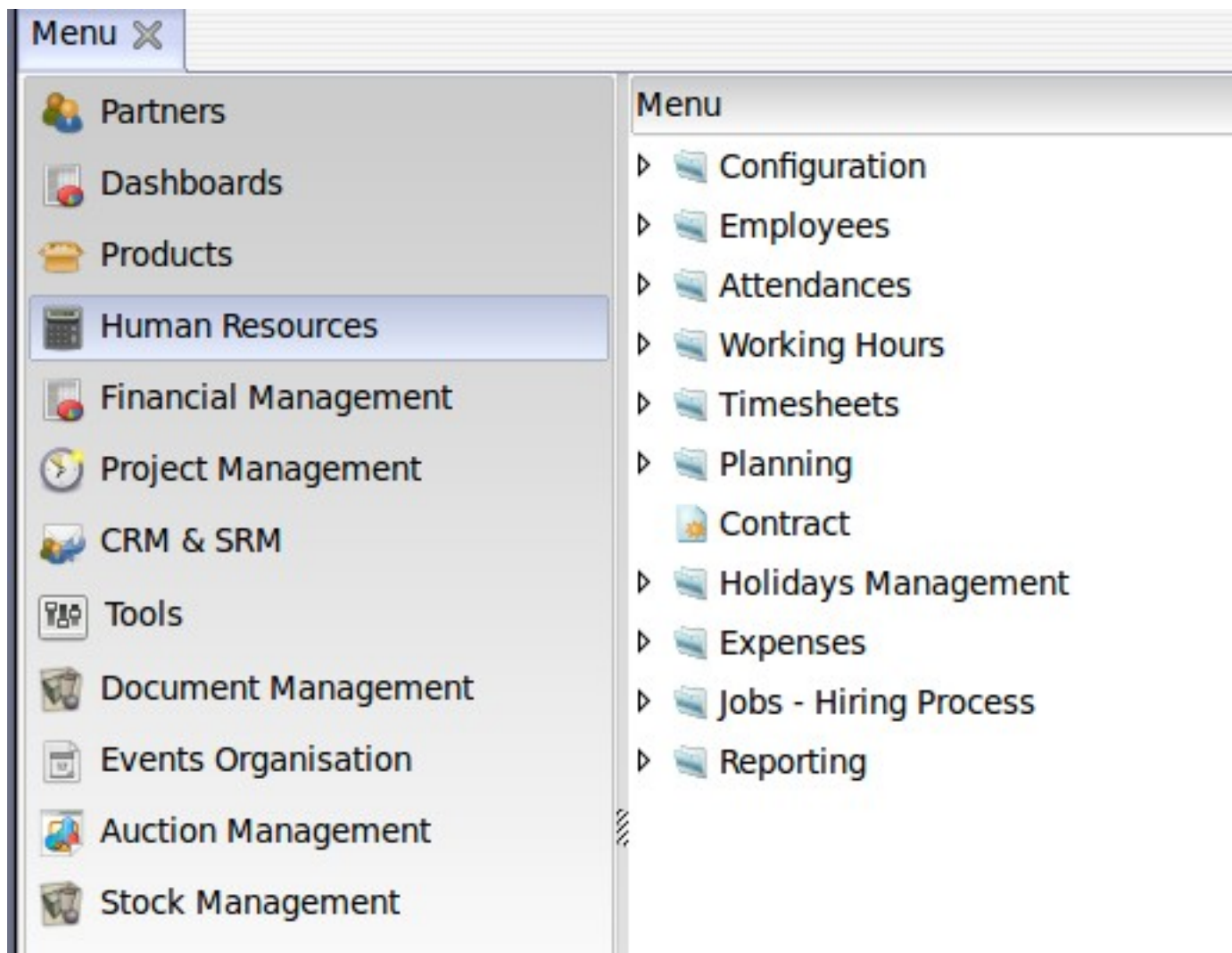
- ✓ **New features**
- ✓ **Simplifications**
  - ✓ **Menus**
  - ✓ **Wizards**
  - ✓ **Views**
- ✓ **New layouts**
  - ✓ **Search views**
  - ✓ **Reports**
- ✓ **Other guidelines**
- ✓ **Exercises**

# V6.0 : features

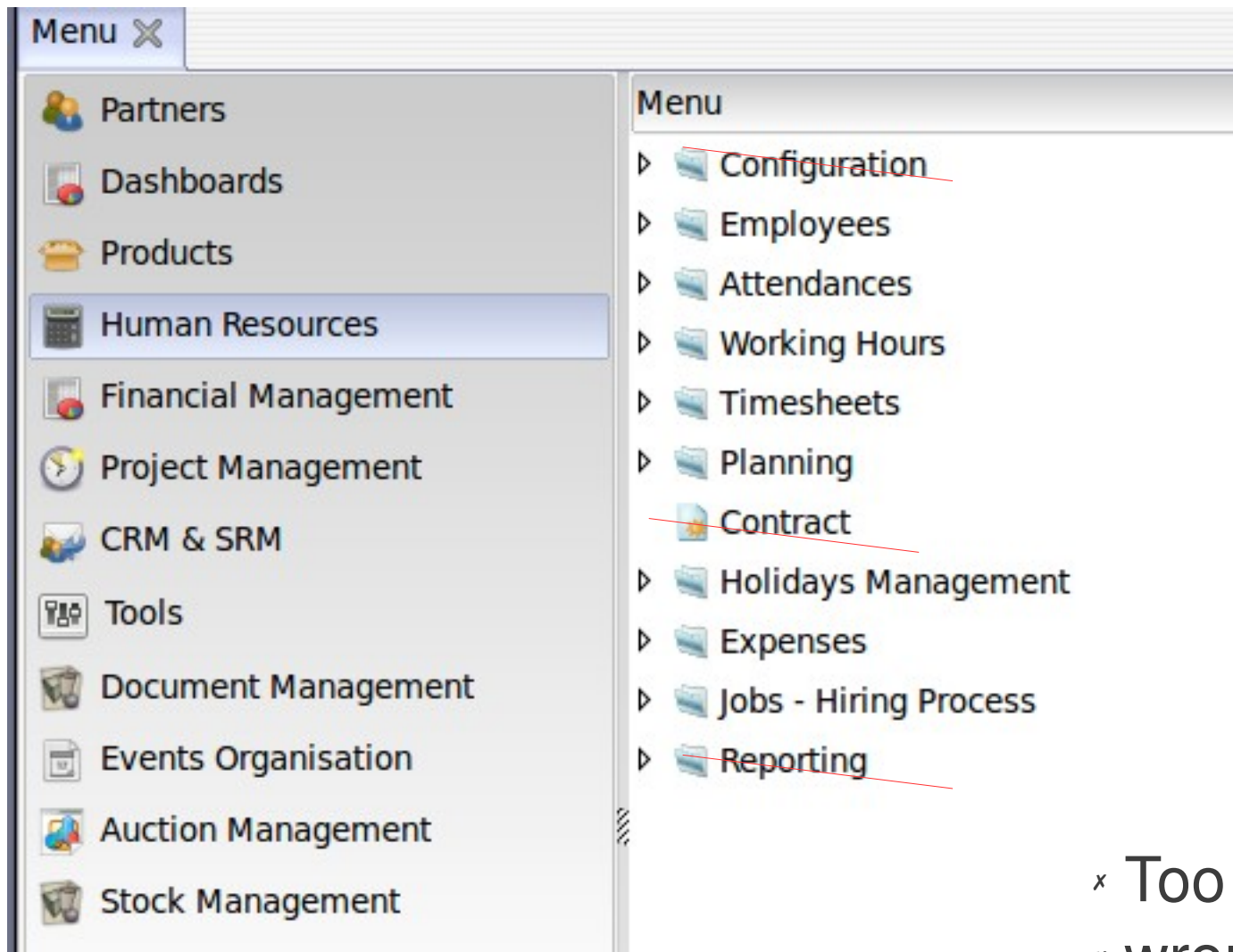
- ✓ **Simplification**
  - ✓ Less menus
  - ✓ Less fields
  - ✓ **Split in Business Applications**
    - ✓ More intuitive
    - ✓ Less steps to achieve the workflow
- ✓ **Reporting adapted for each application**
- ✓ **New filter system**

# ***Simplification***

# Menus



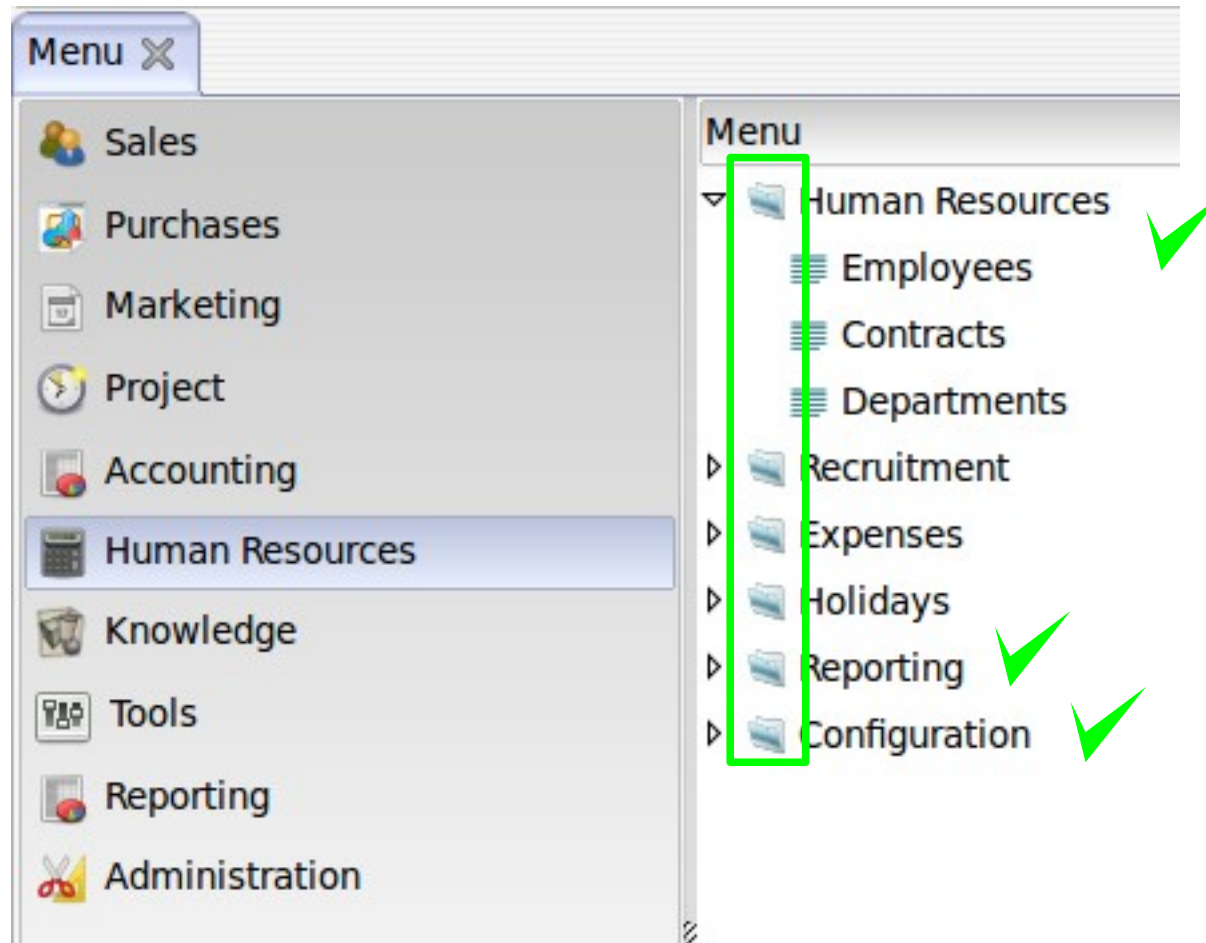
There are at  
least 3  
errors



- x Too many Menus
- x wrong order of items
- x wrong type of items

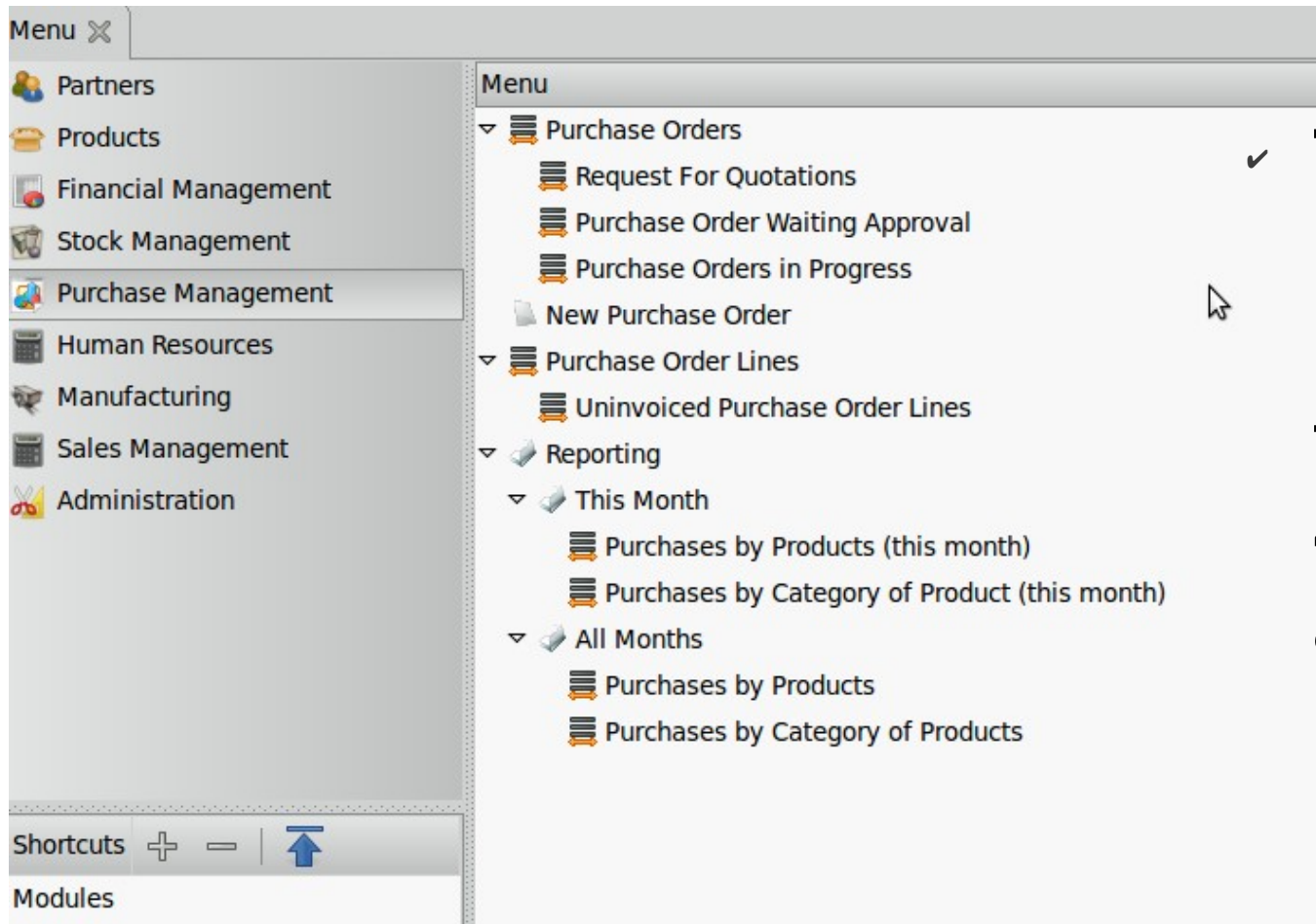


# New menus



# Business Application

# 1 main menu = 1 business application



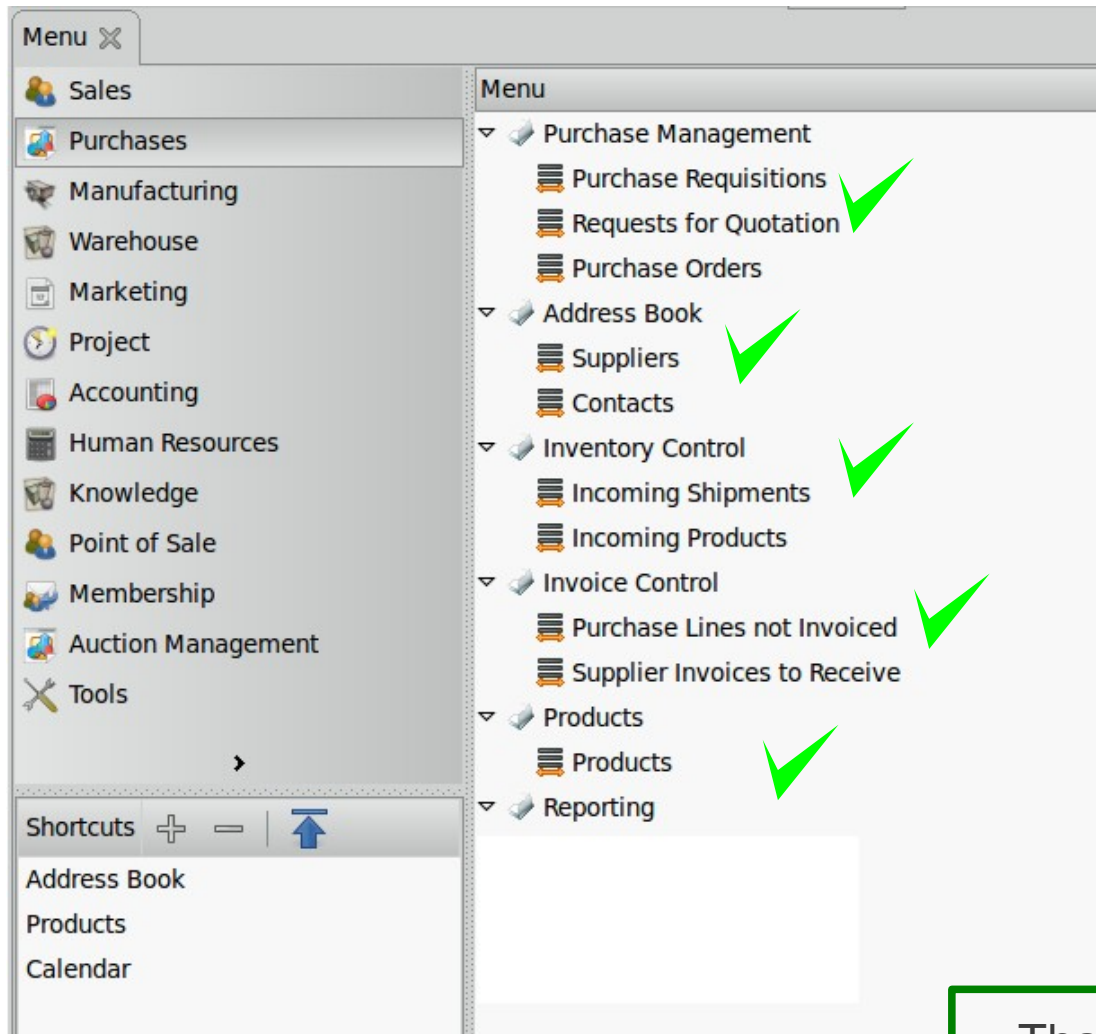
✓ The responsible user for Purchases has to open at least 4 applications to achieve purchases

# 1 main menu = 1 business application

The responsible user for purchases has to access:

- ✓ Partner
- ✓ Product
- ✓ Purchase
- ✓ Stock
- ✓ Invoices

# 1 main menu = 1 business application



**The responsible user for purchases has to access:**

- ✓ **Partner**
- ✓ **Product**
- ✓ **Purchase**
- ✓ **Inventory**
- ✓ **Invoices**

Thanks to the new menu, one responsible user can work in only one application

# Web

The screenshot displays the OpenERP web client interface. At the top, the 'OpenERP' logo is visible on the left, and the user's role 'ADMINISTRATOR' and company name 'OPENERP CORP.' are on the right. A navigation bar below the header contains tabs for various modules: SALES, PURCHASES, MANUFACTURING, WAREHOUSE, MARKETING, PROJECT, ACCOUNTING, and HUMAN RESOURCES. The 'PURCHASES' tab is active, and the 'Purchase Orders' option is selected in the left sidebar. The main content area shows the 'Purchase Orders' form with fields for 'ORDER REFERENCE' (PO00001), 'WAREHOUSE' (OpenERP S.A.), and 'RECEIVED'. Below these fields are tabs for 'PURCHASE ORDER', 'DELIVERY & INVOICES', and 'NOTES'. Further down, there are search fields for 'SUPPLIER' and 'PRICELIST'. At the bottom, a 'Purchase Order Lines' section contains a table with columns 'SCHEDULED DATE' and 'DESCRIPTION', and a 'NEW' button to add lines.

OpenERP

OPENERP CORP.  
ADMINISTRATOR

ADDRESS BOOK | PRODUCTS | CALENDAR |

SALES | PURCHASES | MANUFACTURING | WAREHOUSE | MARKETING | PROJECT | ACCOUNTING | HUMAN RESOURCES

PURCHASE MANAGEMENT

- Purchase Requisitions
- Requests for Quotation
- Purchase Orders

ADDRESS BOOK

INVENTORY CONTROL

INVOICE CONTROL

PRODUCTS

REPORTING

### Purchase Orders ?

SAVE SAVE & EDIT CANCEL

ORDER REFERENCE ? : PO00001

WAREHOUSE : OpenERP S.A.

RECEIVED ? : ☐

PURCHASE ORDER DELIVERY & INVOICES NOTES

SUPPLIER :

PRICELIST ? :

#### Purchase Order Lines

Purchase Order Lines List

SCHEDULED DATE	DESCRIPTION

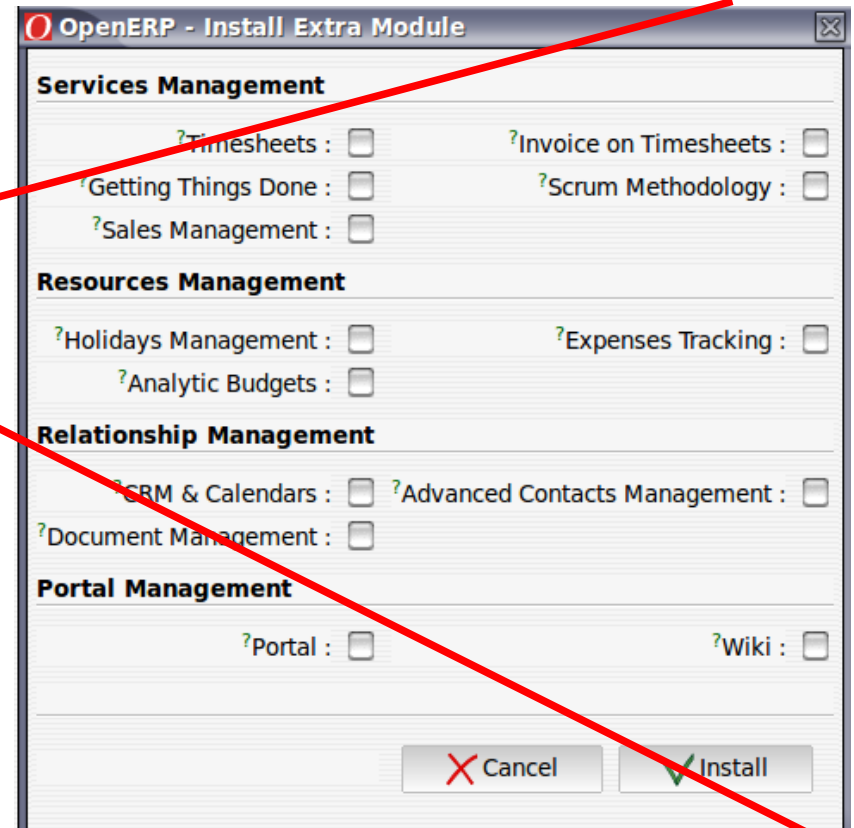
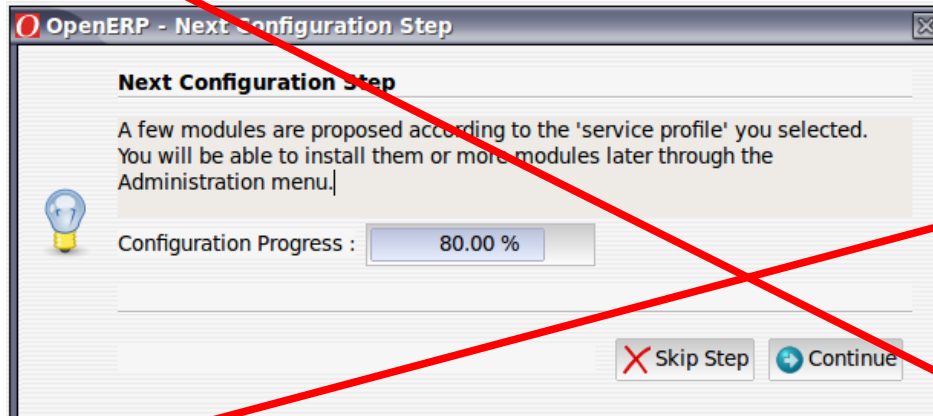
The web Client allows  
Users to see all applications  
every time

# Guide lines (Menus)

- ✓ **Main objects must be first item of the menu**
- ✓ **Reporting must be before Configuration**
- ✓ **Configuration must be the last item on the menu**
- ✓ **1 main menu = 1 business application**
- ✓ **Simplification thanks to a new search screen**
- ✓ **The first level is always a folder (Icon)**

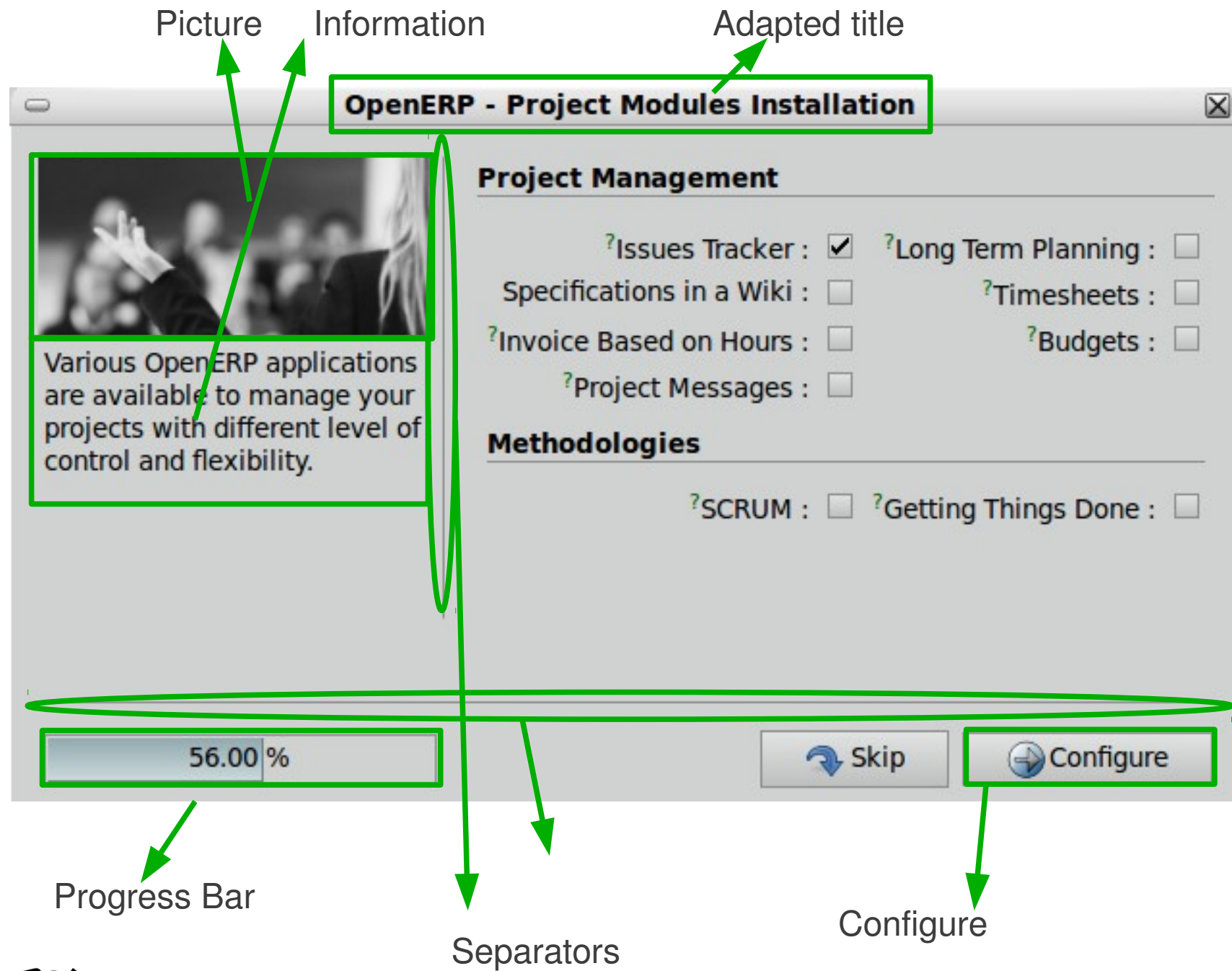
# Configuration Wizards





x At least 4 errors

- 2 wizards, one step is enough
- No picture
- « Install » instead of « Configure »
- Not adapted to each application
  - The context is very important: don't mix HR and project management options.



# Guide lines Wizard

- ✓ **Title adapted to application**
- ✓ **Picture and information on the left**
- ✓ **Separators**
- ✓ **Objects to configure on the right**
- ✓ **Progress bar**
- ✓ **Allow to skip or Configure**

# Views

# 2 Interfaces

- ✓ **Simplified**
- ✓ **Extended**

# Extended Interface

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Diagram Graph Print Action Attachments Menu Reload Close

Menu Sales Orders

Order Reference : SO004 Ordered Date : 07/12/2010 ?Picked : ☐  
Customer Reference : Shop : OpenERP S.A. ?Paid : ☐

Sale Order Other Information History

Customer : Ecole de Commerce de Liege ?Ordering Contact : 2 Impasse de la Soif 6985 Liege  
?Invoice Address : 2 Impasse de la Soif 6985 Liege ?Shipping Address : 2 Impasse de la Soif 6985 Liege  
?Pricelist : Public Pricelist (EUR)

Sales order lines (1/2 of 2)

Description	Qty	UoM	Discount (%)	Unit Price	Cost Price	Subtotal
[PC1] Basic PC	2.00	PCE	0.00	450.00	0.00	900.00
[PC3] Medium PC	5.00	PCE	0.00	900.00	0.00	4,500.00

?Untaxed Amount : 24300.00 ?Taxes : 0.00 ?Total : 24300.00 ?Margin : 450.00 Deposit

?Order State : Manual In Progress Create Invoice Cancel Order

Record: 2 / 5 of 5 - Editing document (id: 4) State:

socket://admin@localhost/trunk\_1 Administrator Company: OpenERP Corp. Requests: 1 request(s) - 1 request(s) sent

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Diagram Graph Print Action Attachments Menu Reload Close

Menu Sales Orders

Order Reference : SO004 Ordered Date : 07/12/2010 ?Picked : ☐

Customer Reference : Shop : OpenERP S.A. ?Paid : ☐

Sale Order Other Information History

**Logistic**

?Incoterm : ?Picking Policy : Partial Delivery ?Shipping Policy : Shipping & Manual Invoice ?Invoice on : Ordered Quantities ?Delivery method :

**Conditions**

Payment Term : Fiscal Position :

**References**

Salesman : Demo User Sales Team : ?Source document :

**Journal**

Journal : Invoice Type :

**Dates**

?Creation Date : 07/12/2010 09:44:06 ?Confirmation Date : 07/12/2010 Requested Date : Effective Date : 07/12/2010 Commitment Date : 07/13/2010

**Notes**

Record: 2 / 5 of 5 - Editing document (id: 4) State:

socket://admin@localhost/trunk\_1 Administrator Company: OpenERP Corp. Requests: 1 request(s) - 1 request(s) sent

Quotation / Order Partial Invoice Make Invoices

✓ Many fields useless for SMEs



# Simplified Interface

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Diagram Graph Print Action Attachments Menu Reload Close

Menu X Sales Orders X

Order Reference : SO001 Ordered Date : 07/12/2010 ?Picked : ☐  
Customer Reference : Shop : OpenERP S.A. ?Paid : ☐

Sale Order Other Information

Customer : Agrolait ?Ordering Contact : Chaussée de Namur, 40 1367 Grand-Rosière  
?Invoice Address : Chaussée de Namur, 40 1367 Grand-Rosière ?Shipping Address : Chaussée de Namur, 40 1367 Grand-Rosière

Sales order lines (1/4 of 4)

Description	Qty	UoM	Discount (%)	Unit Price	Cost Price	Subtotal
New server config + material	1.00	PCE	0.00	123.00	0.00	123.00
[PC1] Basic PC	3.00	PCE	0.00	450.00	0.00	1,350.00
[PC1] Basic PC	3.00	PCE	0.00	450.00	0.00	1,350.00
[MB1] Mainboard ASUSTek A7N8X	5.00	PCE	0.00	88.00	0.00	440.00

?Untaxed Amount : 10423.00 ?Taxes : 0.00 ?Total : 10423.00 ?Margin : 1167.50 Compute + Delivery Costs Deposit

?Order State : Quotation Confirm Order Cancel Order

Record: 5 / 5 of 5 - Editing document (id: 1) State:

socket://admin@localhost/trunk\_1 Administrator Company: OpenERP Corp. Requests: 1 request(s) - 1 request(s) sent

# Simplified Interface

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Diagram Graph Print Action Attachments Menu Reload Close

Menu X Sales Orders X

Order Reference : SO001 Ordered Date : 07/12/2010 ?Picked : ☐  
Customer Reference : Shop : OpenERP S.A. ?Paid : ☐

Sale Order Other Information

**References**

Salesman : Administrator

**Journal**

Journal :   
Invoice Type :

**Notes**

Only the minimum fields required

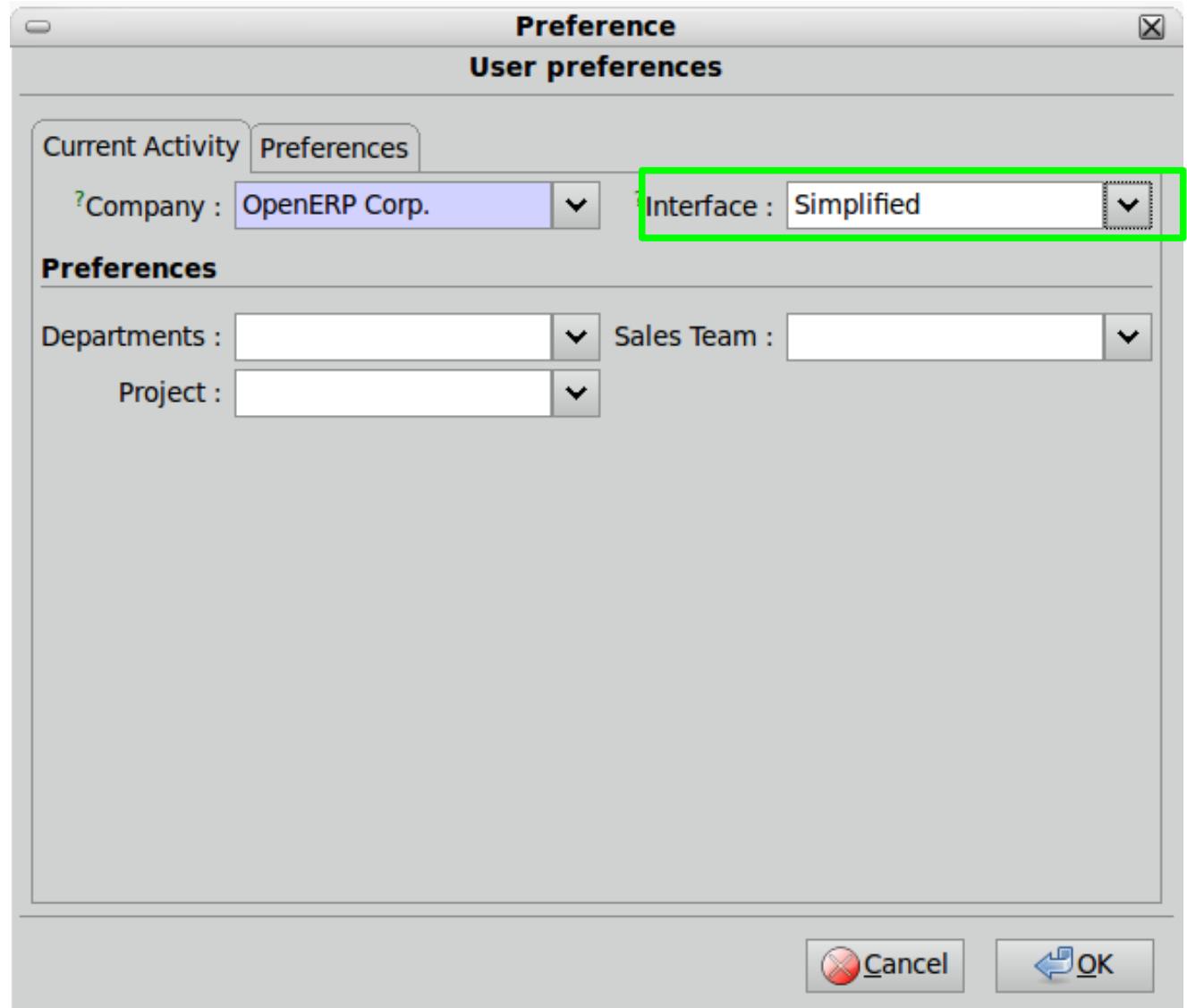
Record: 5 / 5 of 5 - Editing document (id: 1) State:

socket://admin@localhost/trunk\_1 Administrator Company: OpenERP Corp. Requests: 1 request(s) - 1 request(s) sent

Quotation / Order  
Partial Invoice  
Make Invoices

# Switch Extended vs Simplified

- User
  - Preferences



The screenshot shows a window titled "Preference" with a subtitle "User preferences". It has two tabs: "Current Activity" and "Preferences", with "Preferences" being the active tab. Inside the "Preferences" tab, there are two dropdown menus at the top: "Company : OpenERP Corp." and "Interface : Simplified". The "Interface" dropdown is highlighted with a green rectangular border. Below these, there is a section titled "Preferences" containing three more dropdown menus: "Departments :", "Project :", and "Sales Team :". At the bottom right of the window, there are two buttons: "Cancel" (with a red 'X' icon) and "OK" (with a blue checkmark icon).

# ***New Layout***

# Search Views

# Search Views

NewSaveDeleteBackForwardListFormCalendarGraphPrintActionAttachmentsMenuReloadClose

MenuProducts

Name :Code :Category :Variant Price Margin :

Variant Price Extra :

BackForwardClearFind

Code	Name	Variants	Default UoM	Real Stock	Virtual Stock	List Price	Cost Price	Status
UTP5	CAT5e Grey UTP cable		m	0.00	0.00	3.00	2.00	
KIT0	Kit Keyboard + Mouse		PCE	0.00	0.00	7.00	5.00	
MOU	Mouse		PCE	0.00	0.00	7.00	5.00	
KEYA	Keyboard	AZERTY	PCE	0.00	0.00	7.00	5.00	
FAN	Regular case fan 80mm		PCE	0.00	0.00	8.00	5.00	

# New layout in search views

- ✓ Buttons
- ✓ Group by
- ✓ Extended Filters
- ✓ Integrate business logic

The screenshot displays the OpenERP search view for 'Products'. At the top, there are tabs for 'Menu' and 'Products'. Below the tabs, there are four buttons: 'Services', 'Stockable', 'To Sell', and 'To Purchase'. To the right of these buttons are three input fields labeled 'Reference :', 'Name :', and 'Category :'. Below these fields, there is a 'Group by...' section with three buttons: 'Category', 'Default UOM', and 'Type'. Below the 'Group by...' section, there is an 'Extended options...' section with two input fields labeled 'Location :' and 'Pricelist :'. At the bottom, there is a search bar with a dropdown menu showing 'Active', a button labeled 'contains', and a text input field. To the right of the search bar is a button labeled 'AND' and a minus sign. At the bottom left, there are two buttons: 'Find' and 'Clear'. At the bottom right, there is a button labeled '-- Filters --' and a plus sign.

## Guidelines (search views)

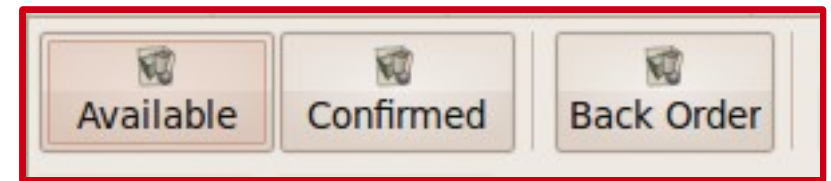


- ✓ **Different colors to qualify different states**
  - ✓ Grey for Canceled states (and sometimes for Done state)
  - ✓ Red for exception states (ex: Date < Current date) and not in Done or Canceled state
  - ✓ Blue for Draft or Pending state
  - ✓ Black for normal state (Confirmed, Available, ...)

<div> <div>Current</div> <div>Open</div> <div>Pending</div> <div>Today</div> <div>7 Days</div> </div> <div> Opportunity : <input type="text"/> Salesman : <input type="text"/> Email : <input type="text"/> Sales Team : <input type="text"/> </div> <div> Extended options... Group By... </div> <div> Find Clear </div> <div> -- Filters -- </div> <div> 100 </div>									
Creation Date	Opportunity	Partner Name	Next Action D.	Stage	Expected Revenue	Probability (%)	Salesman	State	
07/07/2010 13:32:24	Interview call	BalmerInc S.A.			0.00	0.00 %	Administrator	Open	
07/07/2010 13:32:24	Capegemini				0.00	0.00 %	Administrator	Cancelled	
07/07/2010 13:32:24	Dirt Mining Ltd 271742 - 1000 units	Maxtor		Closed Won	42,000.00	80.00 %	Administrator	Closed	
07/07/2010 13:32:24	ABC FUEL CO 829264 - 1000 units	BalmerInc S.A.		Proposal/Price Quote	45,000.00	40.00 %	Demo User	Open	
07/07/2010 13:32:24	Mediapole - 5000 units	Mediapole SPRL		Negotiation/Review	55,000.00	70.00 %	Administrator	Pending	
07/07/2010 13:32:24	3rd Round Funding - 1000 units	Leclerc		Prospecting	45,000.00	50.00 %	Administrator	Draft	
07/07/2010 13:32:24	CONS TRUST (AZ) 529701 - 1000 units	China Export		Value Proposition	85,000.00	100.00 %	Administrator	Closed	

- ✓ Buttons on the top left are grouped by context, with a separator between different contexts.
- ✓ Default search fields might reflect the **available columns** in the list view.
- ✓ The « **Group By** » button gives results in **black and bold**.
- ✓ When necessary, display search field in selection box, with a filter for « **My...** » (if it's selected by default put the button on the left)

- ✓ Buttons on the top left are grouped by context, with a separator between different contexts.



- ✓ Default search fields might reflect the **available columns in the list view.**

Example: for the Delivery Order, Available and Confirmed buttons are based on the object state, so they are grouped. Back Order is another context, so it's displayed separately.

A screenshot of the OpenERP web interface. At the top, there is a menu bar with tabs for 'Menu', 'Products', 'Sales Orders', 'Manufacturing Orders', 'Incoming shipments', and 'Delivery Orders'. Below the menu, there are several buttons: 'Services', 'Stockable', 'Can be sold', and 'Can be Purchased'. To the right of these buttons are three search fields labeled 'Code :', 'Name :', and 'Category :'. Below the search fields, there are links for 'Extended options...' and 'Group by...'. At the bottom, there is a 'Find' button and a 'Clear' button. On the right side, there is a 'Filters' dropdown menu and a '100' dropdown menu. At the very bottom, there is a table header with columns: 'Code', 'Name', 'Category', 'Variants', 'Default UoM', 'Real Stock', 'Virtual Stock', 'List Price', 'Cost Price', and 'State'. The 'Code', 'Name', and 'Category' columns are highlighted with a red border.

- ✓ **Columns order depends on the relevant object, but the minimum requirements are:**
  - ✓ **Start with the object name, reference, etc.**
  - ✓ **End with Progress bar, State and action buttons**
  - ✓ **If buttons are related to a field, it has to be placed next to this field.**  
(For ex.: in tasks, Stage field has a button to switch to the next stage)

Menu  Purchase Orders  Incoming shipments  Tasks									
TODO          Current          In Progress          Pending          Deadlines		Task Summary :		Project :		Assigned to :			
Group By... Find          Clear		-- Filters --				100			
Task Summary	Project	Assigned to	Remaining Hours	Deadline	Stage	Progress (%)	State		
Specific adaptation to MRP	Specific Developements	Administrator	36:00		Development	5.26 %	In Progress		
MRP; fonctionnal layer	Study + Prototype	Administrator	24:00			100.00 %	Done		
In house training	Install, data import, configuration	Administrator	32:00	06/06/2007		0.00 %	In Progress		
Validation + latest modifications.	Specific Developements	Administrator	06:00			75.00 %	In Progress		

# Reports

# Reports

OpenERP - socket://admin@localhost/trunk\_2

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Diagram Graph Print Action Attachments Menu Reload Close

Menu Leads Opportunities Sales Analysis

365 Days 30 Days 7 Days Quotations Sales Picked Partner : Product : Salesman :

Group By... Salesman Partner Product Default UoM Category of Product Analytic Account State Shop Day Month Year

Extended options... Find Clear -- Filters -- 100

Salesman	# of Lines	# of Qty	Shipped Qty	Average Price	Total Price	Commitment Delay
Demo User	7	26.00	0	561.14	13,244.00	0.00
Administrator	4	12.00	0	277.75	3,263.00	0.00

- Complete analysis
- Integrate business logic

# Guidelines

- ✓ **Noleaf**
- ✓ **Default values**
  - ✓ year/month/day default value month
- ✓ **“Extended Options” below “Group By”**
- ✓ **Group By**
  - ✓ ... | Company | Day | Month | Year
  - ✓ Separator between fields related to the same “activity”
- ✓ **Extended Options:**
  - ✓ Filter on dates : new line
  - ✓ Folded by default
- ✓ **Main fields on the same line than first button**
- ✓ **No field selection**

# *Other guidelines*



Form view

✓ Fields « notes » must be laid out like this :

Note



not like this: Note



General Sales & Purchases Notes History Accounting Warnings Categories Profiling Membership

**Customer Accounting Properties**

Account Receivable : 110000 Debitors

OK (title in black with separator)

Cust

Total Receivable : 0.00

Credit Limit : 0.00

General Sales & Purchases Notes History Accounting Warnings Categories Profiling Membership

~~Address~~

~~Postal Address~~

~~Address Type : Default~~

~~Street : 69 rue de Chimay~~

~~Country : Belgium~~

~~Fed. State :~~

~~Contacts~~

Not ok (array and title no bold)

# Pop-Ups

- ✓ Add icons on Validate or Cancel buttons.
- ✓ The « cancel » button must be placed on the left.

# ***Exercises***

*(find the troubles yourself)*

Search view

# Product List

- ✓ There is at least 1 problem in this screen:

The screenshot shows the OpenERP Product List interface. The window title is "OpenERP". The menu bar includes File, User, Form, Options, Plugins, Shortcuts, and Help. The toolbar contains icons for New, Save, Delete, Back, Forward, List, Form, Calendar, Graph, Print, Action, and Attachments. The main menu is open, showing options like Menu, Expenses, Leave Request(s), Products, and Products. The "Products" menu is selected, and the "List" button is highlighted. The interface includes search fields for Code, Name, and Category, with a dropdown for "All products / Sellable". There are also buttons for "Find" and "Clear", and a "Filters" section. The table below displays the product list:

Code	Name	Category	Variants	Default UoM	Real Stock	Vi
FAN2	Silent fan	All products / Sellable		PCE	0.00	
	Advance Product	All products / Sellable		PCE	0.00	

The status bar at the bottom shows "Record: 1 / 2 of 2 - Editing document (id: 15)", "State:", "socket://localhost:8070 [trunk]", "Administrator", "Company: Tiny sprl", and "Requests: 1 request(s)".



# Product List

✓ There are at least two problems in this screen:

The screenshot shows the OpenERP Product List interface. The sidebar on the left contains a tree view for categories, with 'All products / Sellable' selected. The main table displays two products:

Code	Name	Category	Variants	Default UoM	Real Stock	V
FAN2	Silent fan	All products / Sellable		PCE	0.00	
	Advance Product	All products / Sellable		PCE	0.00	

The status bar at the bottom indicates: Record: 1 / 2 of 2 - Editing document (id: 15), State: , socket://localhost:8070 [trunk], Administrator, Company: Tiny sprl, Requests: 1 request(s).

- Categories are laid out in tree view, but when you filter them, you only get the products belonging to a category (and not its children). We must use the tree advantage. (child\_of)

# Product List – Proposed Solution

OpenERP

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments

Menu Products

Services Stockable Can be sold Can be Purchased

Code : Name : Category : All products / Sellable

Extended options... Group by...

Find Clear -- Filters -- 100

Code	Name	Category	Variants	Default UoM	Real Stock
	Onsite Senior Intervention	All products / Sellable / Services / Onsite Intervention		PCE	0.00
	Onsite Intervention	All products / Sellable / Services / Onsite Intervention		PCE	0.00
PC1	Basic PC	All products / Sellable / Computer Stuff / PC		PCE	0.00
PC2	Basic+ PC (assembly on order)	All products / Sellable / Computer Stuff / PC		PCE	0.00
PC3	Medium PC	All products / Sellable / Computer Stuff / PC		PCE	0.00
PC4	Customizable PC	All products / Sellable / Computer Stuff / PC		PCE	0.00
MB1	Mainboard ASUSTek A7N8X	All products / Sellable / Computer Stuff / IT components		PCE	12.00
MB2	Mainboard ASUSTek A7V8X-X	All products / Sellable / Computer Stuff / IT components		PCE	0.00
CPU1	Processor AMD Athlon XP 1800+	All products / Sellable / Computer Stuff / IT components		PCE	12.00
CPU2	Processor AMD Athlon XP 2200+	All products / Sellable / Computer Stuff / IT components		PCE	5.00
HDD1	HDD Seagate 7200.8 80GB	All products / Sellable / Computer Stuff / IT components		PCE	5.00
HDD2	HDD Seagate 7200.8 120GB	All products / Sellable / Computer Stuff / IT components		PCE	0.00
HDD3	HDD Seagate 7200.8 160GB	All products / Sellable / Computer Stuff / IT components		PCE	0.00
FAN	Regular case fan 80mm	All products / Sellable / Computer Stuff / IT components		PCE	12.00
FAN2	Silent fan	All products / Sellable		PCE	0.00
CPU_GEN	Regular processor config	All products / Sellable / Computer Stuff / IT components		PCE	0.00
RAM	DDR 256MB PC400	All products / Sellable / Computer Stuff / PC		PCE	12.00

Record: 1 / 28 of 28 - Editing document (id: 1) State:

socket://localhost:8070 [trunk] Administrator Company: Tiny sprl Requests: 1 request(s)

# Manufacturing Order (5 problems to find)

## this is the screen you get after entering the menu

OpenERP

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments

Menu Manufacturing Orders Manufacturing Orders

Ready In Production Late

Reference : Product : Routing : Source Document : Group By

Find Clear -- Filters -- 100

Reference	Product	Product Qty	Scheduled date	Source Document	State
MO/00006	[CPU_GEN] Regular processor config	3.00	02/22/2010 20:52:55	SO003:MO/00002	Ready to Produce
MO/00001	[PC3] Medium PC	5.00	02/23/2010 20:52:56	SO004	Ready to Produce
MO/00002	[PC1] Basic PC	3.00	02/24/2010 20:52:55	SO003	Done
MO/00007	[CPU_GEN] Regular processor config	3.00	02/27/2010 20:52:55	SO003:MO/00003	Ready to Produce
MO/00008	[CPU_GEN] Regular processor config	2.00	02/28/2010 20:52:56	SO004:MO/00004	Ready to Produce
MO/00003	[PC2] Basic+ PC (assembly on order)	3.00	03/01/2010 20:52:55	SO003	Waiting Goods
MO/00004	[PC1] Basic PC	2.00	03/02/2010 20:52:56	SO004	Waiting Goods
MO/00009	[CPU_GEN] Regular processor config	4.00	03/07/2010 20:52:56	SO005:MO/00005	Ready to Produce
MO/00005	[PC2] Basic+ PC (assembly on order)	4.00	03/09/2010 20:52:56	SO005	Waiting Goods

Total Qty: 29.00 Total Hours: 60.00 Total Cycles: 18.00

Record: 1 / 9 of 9 - Editing document (id: 6) State:

socket://localhost:8070 [trunk] Administrator Company: Tiny sprl Requests: 1 request(s)

# Manufacturing Order – The problems

- ✓ When you enter the menu, you don't want to see « Done » and « Canceled » orders. The « Ready » button should be selected by default.
- ✓ The colors are not right. « Ready to Produce should not be red ».
- ✓ The buttons that filter on states are not complete: « draft » is missing. « Current » is missing= ready + waiting goods.
- ✓ Columns organization is not appropriate: « there is the quantity but not the Unit of Measure »
- ✓ Buttons that filter on the same fields must be packed together. Others must be separated by vertical separators => Late must be separated from the state buttons.

# Manufacturing Order – The solution

OpenERP

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments Menu Reload

Menu Manufacturing Orders

Draft Current Ready In Production Late

Reference : Product : Routing : Source Document :

Group By

Find Clear -- Filters -- 100

Reference	Product	Product Qty	Product UOM	Scheduled date	Source Document	State
MO/00006	[CPU_GEN] Regular processor config	3.00	PCE	02/22/2010 20:52:55	SO003:MO/00002	Ready to Produce
MO/00001	[PC3] Medium PC	5.00	PCE	02/23/2010 20:52:56	SO004	Ready to Produce
MO/00007	[CPU_GEN] Regular processor config	3.00	PCE	02/27/2010 20:52:55	SO003:MO/00003	Ready to Produce
MO/00008	[CPU_GEN] Regular processor config	2.00	PCE	02/28/2010 20:52:56	SO004:MO/00004	Ready to Produce
MO/00003	[PC2] Basic+ PC (assembly on order)	3.00	PCE	03/01/2010 20:52:55	SO003	Waiting Goods
MO/00004	[PC1] Basic PC	2.00	PCE	03/02/2010 20:52:56	SO004	Waiting Goods
MO/00009	[CPU_GEN] Regular processor config	4.00	PCE	03/07/2010 20:52:56	SO005:MO/00005	Ready to Produce
MO/00005	[PC2] Basic+ PC (assembly on order)	4.00	PCE	03/09/2010 20:52:56	SO005	Waiting Goods

Total Cycles: 15.00 Total Qty: 26.00 Total Hours: 54.00

Record: 1 / 8 of 8 - Editing document (id: 6) State:

socket://localhost:8070 [trunk] Administrator Company: Tiny sprl Requests: 1 request(s)

PS: We forgot to change red lines.

# Invoices (5 problems to find)

OpenERP

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments Menu Reload Close

Menu Customer Invoices

Draft Proforma Unpaid Invoice Number : Partner : Price : Source Document :

Find Clear -- Filters -- 100

Description	Type	Invoice Number	Company	Partner	Untaxed	Total	Currency	Date Invoiced	Due Date	Residual	State	Source Document
Test invoice 1	Customer Invoice	2010/001	Tiny sprl	ASUSTek	1,850.00	1,850.00	EUR	02/28/2010		0.00	Done	

Untaxed amount: 1,850.00 Total amount: 1,850.00

Record: 1 / 1 of 1 - Editing document (id: 1) State:

socket://localhost:8070 [trunk] Administrator Company: Tiny sprl Requests: 1 request(s)

# Invoices – The problems

- ✓ The columns are not in the appropriate position (state must be the latest field, ...)
- ✓ There is no need to repeat the type of every invoice in the tree view (the tab title already specifies the type)
- ✓ Group by... options are missing in the search criteria
- ✓ You can filter on the « Price », but the title of the column is « Total ». You have to remain coherent. The filter should be « Total » like the column header.
- ✓ We should be able to filter on the salesman of invoices.

# Invoices – First Solution (still 2 problems to solve)

**OpenERP**

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments Menu Reload

Menu Customer Invoices

Draft Proforma Unpaid

Invoice Number : Partner : Salesman : Source Document : Total : 0.00 - 0.00

Group By...

Find Clear -- Filters -- 100

Date Invoiced	Invoice Number	Partner	Description	Company	Salesman	Due Date	Source Document	Currency	Residual	Untaxed	Total	State
02/28/2010	2010/001	ASUSTek	Test invoice 1	Tiny sprl	Administrator			EUR	0.00	1,850.00	1,850.00	Done
		ASUSTek	Test invoice 1	Tiny sprl	Administrator			EUR	1,850.00	1,850.00	1,850.00	Draft

Untaxed amount: 3,700.00 Total amount: 3,700.00

Record: 1 / 2 of 2 - Editing document (id: 1) State:

socket://localhost:8070 [trunk] Administrator Company: Tiny sprl Requests: 1 request(s)



# Invoices – The problems part II

- ✓ On the salesman filter field, we should add an icon to automatically filter on « My Invoices ». If « my invoices » is selected by default, it should be on the left.
- ✓ On the total below the list, we can add the residual amount, which is displayed in the list view but not in the above totals.

# Invoices – First Solution

OpenERP

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Graph Print Action Attachments Menu Reload Close

Menu Customer Invoices Customer Invoices

Draft Proforma Unpaid

Invoice Number : Partner : Salesman : Source Document : Total :  
    0.00 - 0.00

Group By...

Find Clear -- Filters -- 100

Date Invoiced	Invoice Number	Partner	Description	Company	Salesman	Due Date	Source Document	Currency	Residual	Untaxed	Total	State
02/28/2010	2010/001	ASUSTek	Test invoice 1	Tiny sprl	Administrator			EUR	0.00	1,850.00	1,850.00	Done
		ASUSTek	Test invoice 1	Tiny sprl	Administrator			EUR	1,850.00	1,850.00	1,850.00	Draft

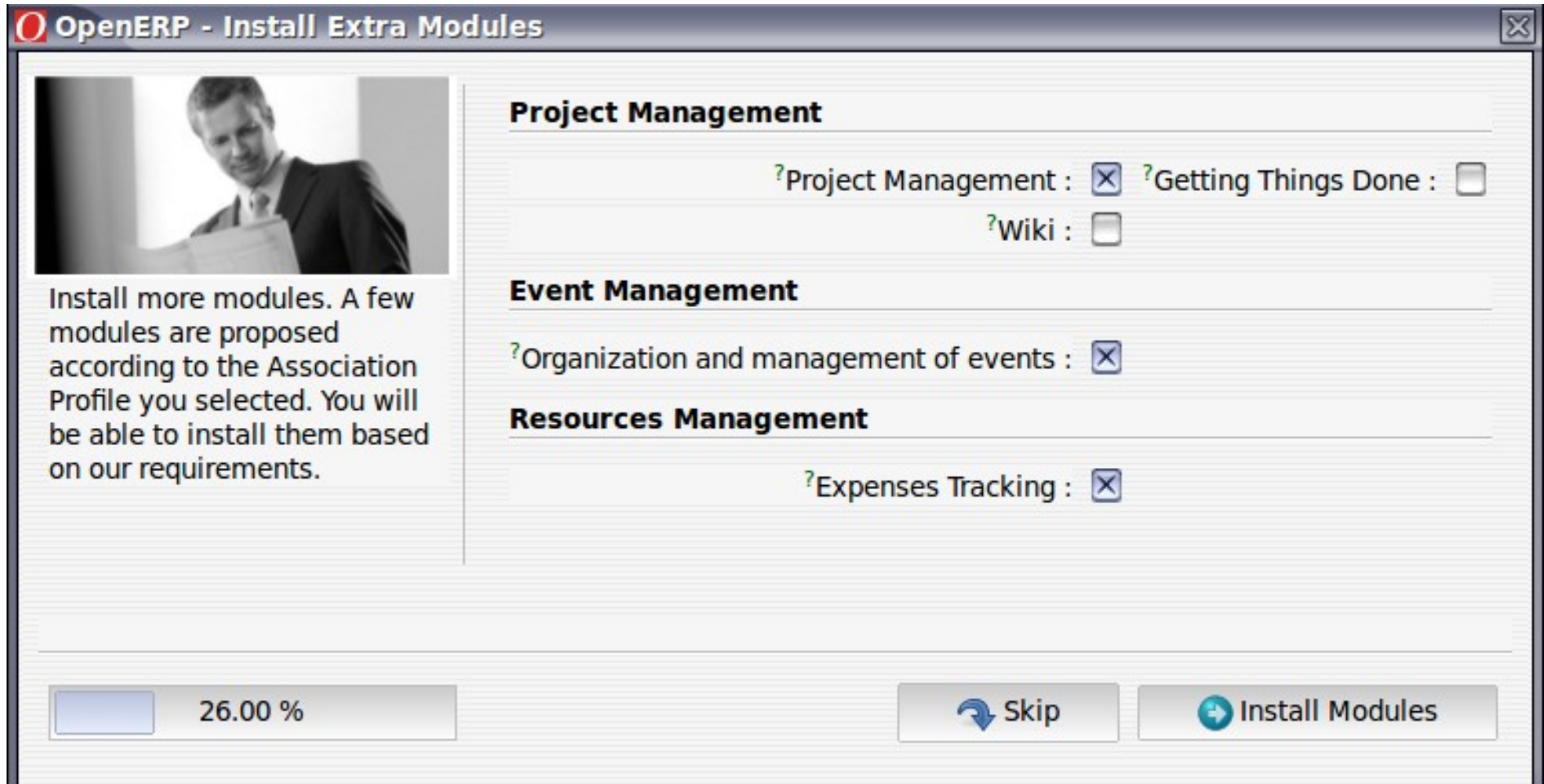
Residual Amount: 1,850.00    Untaxed Amount: 3,700.00    Total Amount: 3,700.00

Record: 1 / 2 of 2 - Editing document (id: 1)    State:

socket://localhost:8070 [trunk]    Administrator    Company: Tiny sprl    Requests: 1 request(s)

# Wizards of Configuration

# There are at least 3 errors



# Errors

- ✓ **Title is not adapted**
  - ✓ “Modules for Association Management”
- ✓ **Do not mix different applications in the same screen:**
  - ✓ The context is very important to understand a screen
- ✓ **Install Modules button instead of “Configure”**

# Reports

# At least 3 problems

File User Form Options Plugins Shortcuts Help

New Save Delete Back Forward List Form Calendar Diagram Graph Print Action Attachments Menu Reload Close

Menu X Purchase Analysis X Sales Analysis X

365 Days 30 Days 7 Days Quotations Sales Picked Partner : Product : Salesman :

Group By... Salesman Partner Product Default UoM Category of Product Analytic Account State Shop Day Month Year

Extended options... Date Order : Date Confirm : Shop : Category of Product : Find Clear -- Filters -- 100

# of Lines	# of Qty	Shipped Qty	Average Price	Total Price	Commitment Delay
11	38.00	0	458.09	16,507.00	0.00

# of Lines: 11.00 # of Qty: 38.00 Shipped Qty: 0.00 Average Price: 5,039.00 Total Price: 16,507.00 Commitment Delay: 0.00

Record: 1 / 11 of 11 - Editing document (id: 4) State:

socket://admin@localhost/trunk\_1 Administrator Company: OpenERP Corp. Requests: 1 request(s) - 1 request(s) sent

# Errors

- ✓ **Not default values**
- ✓ **No separator between Category of Product and Analytic account**
- ✓ **Extended options should be folded**