Go Live Usability Recommendations

There are several things that can be done by administrators to make the system more user friendly, and many of these are done near the end of the implementation process.

Saved Searches

- Create saved searches to help people find the records they need to work on
- Use variables to minimize the number of searches you need to create, and to allow different types of users to share one search where possible
- For more information, see Creating Saved Searches for Go Live

Quick Search

- Configure Quick Search fields for each table by editing the default view and selecting the "Quick Search" checkbox next to fields users will want to search on
- Create "Active Only" filters for each table so users can easily hide inactive records
- For more information, see Quick Search Setup

Dashboards

- Create at least one dashboard for each role, and assign each role a default dashboard
- Adjust dashboard permissions so only select users can create their own widgets; this minimizes potential performance problems

Reports

- Make sure reports are available to the right people
- Check permissions to avoid masses of users creating reports

Look and Feel

- Use Navigation Menu Setup to configure and assign default navigation menus for all user roles
- Configure shortcuts and general preferences and apply them to groups

Miscellaneous

- Configure email templates to help users easily send manual emails
- Add color and diagrams where possible to make things easier to use: icon coloring, row coloring in views, diagrams with icons for quick understanding
- Add input instructions or hover-over tooltip messages to help users understand workflows and field names