

Using the Microsoft Visio™ Template for SAP Duet™ User Interface (UI) Design

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Welcome

Welcome to the Microsoft Visio™ template for SAP Duet™ User Interface (UI) design.

The Microsoft Visio template contained in this Zip file has been created to allow you to more easily construct screens for your Duet scenario. Many pre-packaged elements have been provided in the form of screen backgrounds and stencils which contain specific building blocks or “shapes” for building your screen designs.

The following instructions will outline file set-up, use, and management, plus descriptions for designing and constructing specific use-cases.

For additional information, visit the Duet User Experience Wiki:

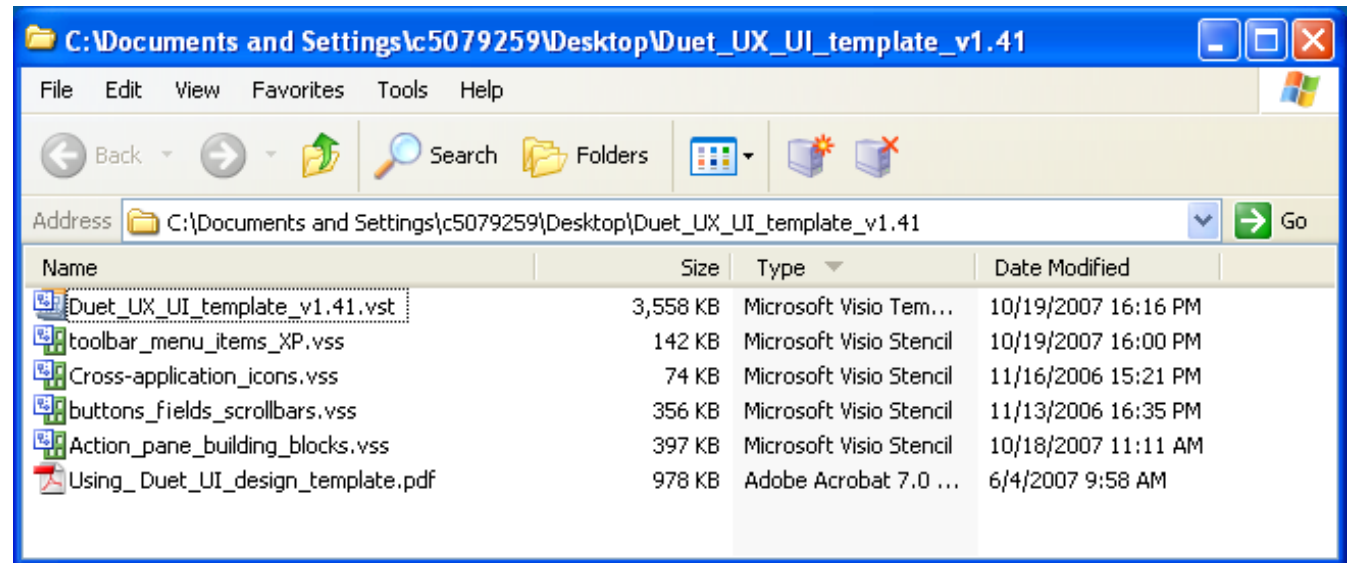
<https://wiki.wdf.sap.corp/display/Duet/Duet+User+Experience>

File Set-up, Use, and Management

What's included:

The template file set is delivered as a compressed file archive containing six files as shown (the template file, user guide and four "stencil" files).

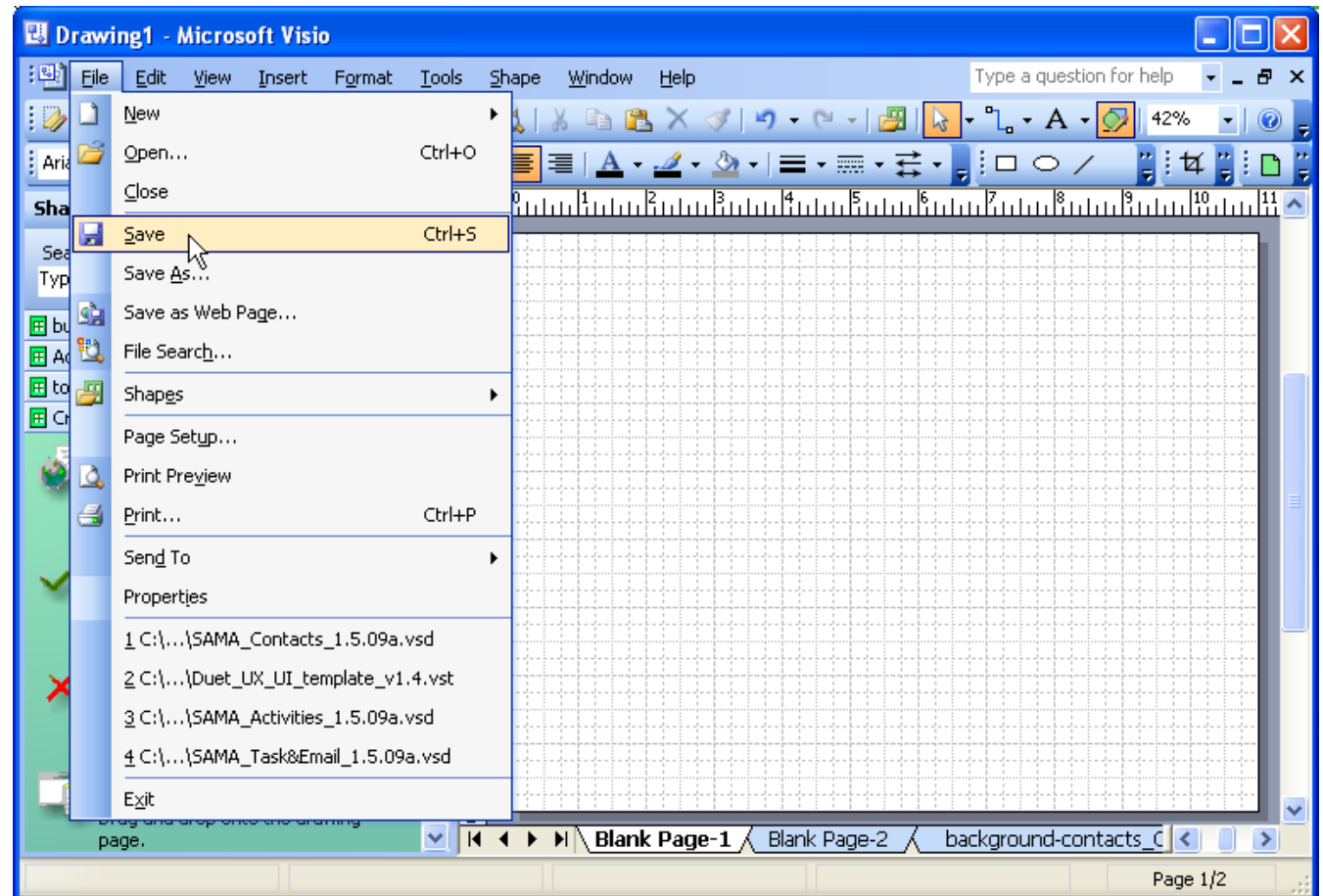
Use the Visio template for SAP Duet User Interface design to create a new Visio document. Once saved, the new Visio document can be revised and changed as desired.



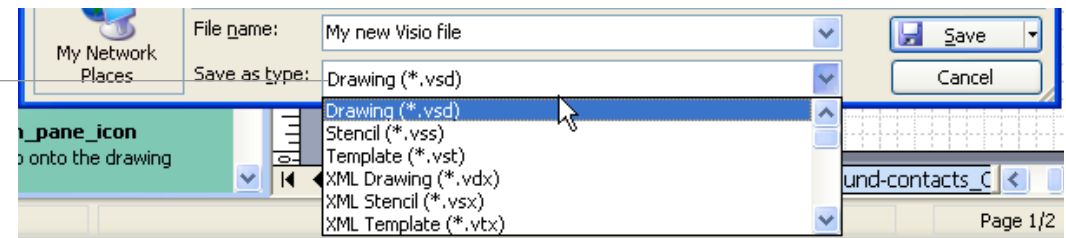
Open a New Visio Document

To open a new Visio document:

1. Double-click the Visio template file; a new, un-named Visio document will automatically open (the default file name will be "Drawing1").
2. To save the file, go to "File > Save" and use your preferred naming convention (in this case, the file is named "My new Visio document").



The new file will have a .vsd extension denoting it as a Visio document.



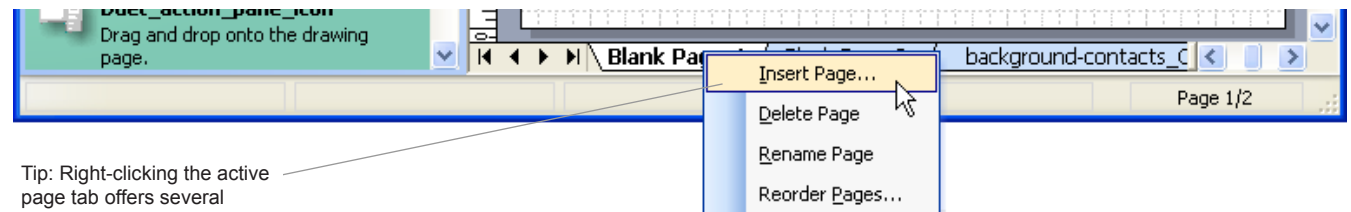
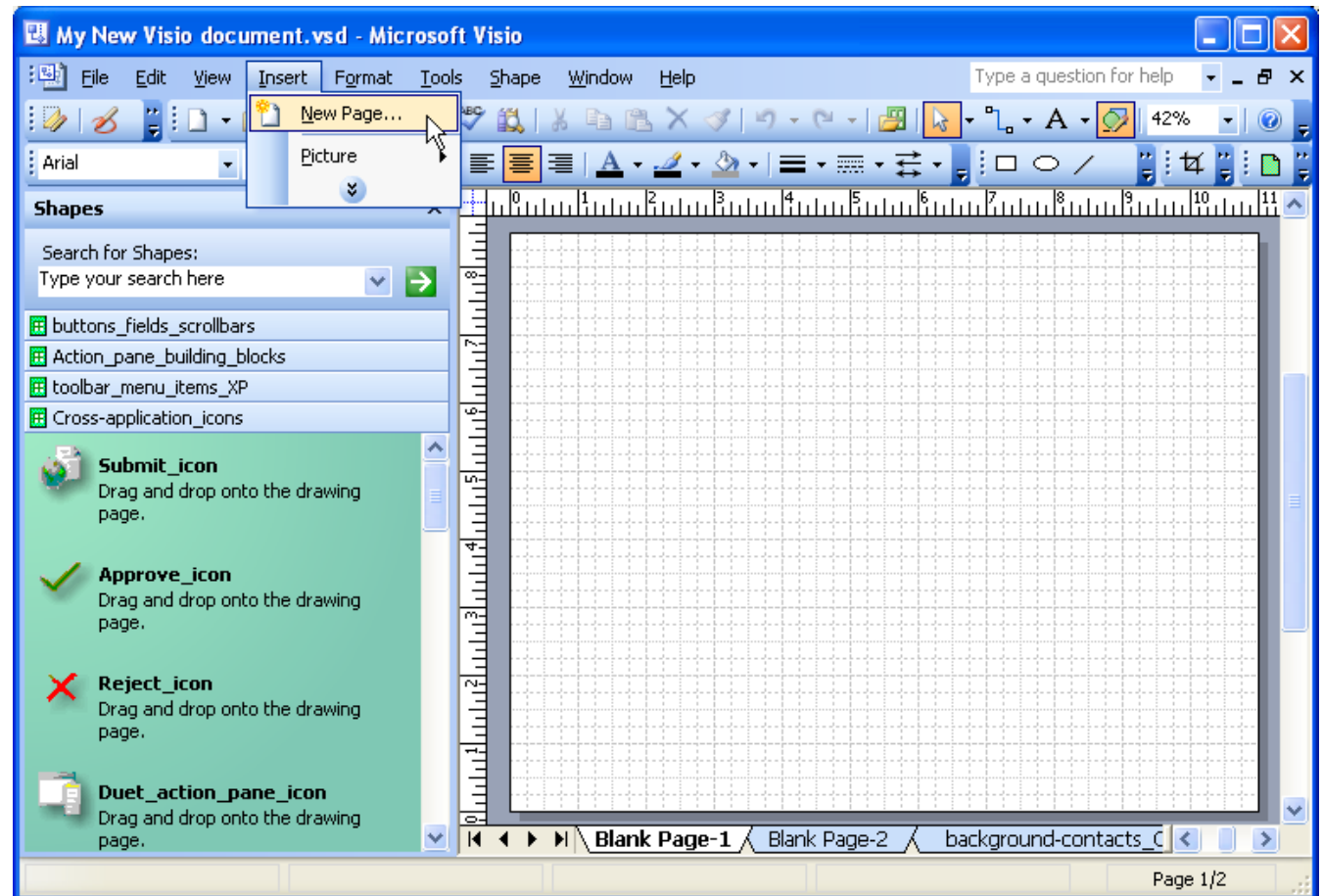
Insert a New Page

The template comes with two blank pages already in place (Blank Page-1 and Blank Page-2). Additional, new pages can be inserted as necessary.

To insert a new page:

1. Select "Insert > New Page..." or right-click a page tab to insert, delete, rename, and reorder pages.
2. Name the new page as desired (in this case, the new page is named "Sample screen 01").

The new page name will appear in the page tabs at the bottom of the screen.



Tip: Right-clicking the active page tab offers several shortcuts, including inserting a new page.

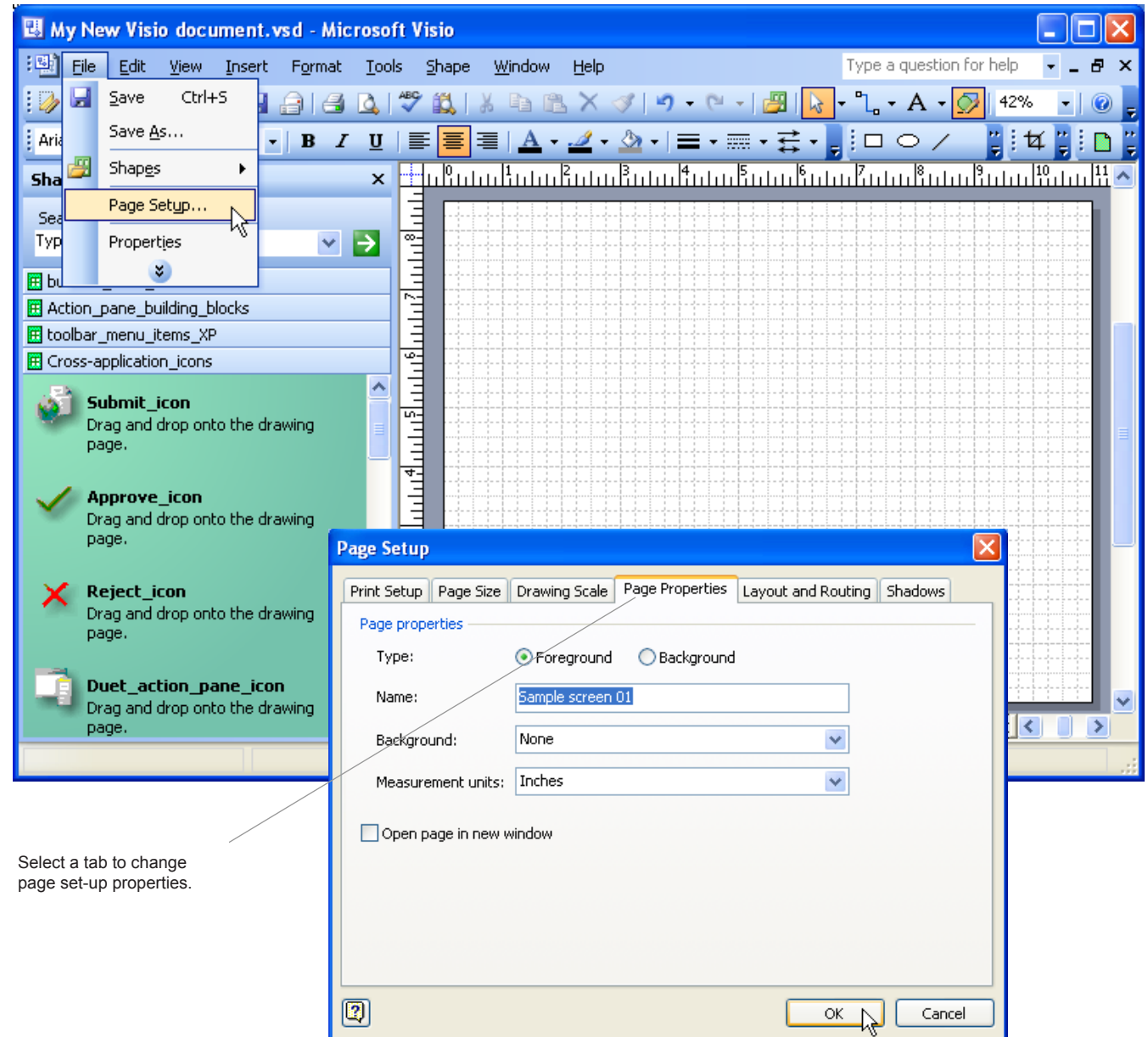
Changing a Page's Set-up

You can change a page's set-up in a number of ways including print set-up, page size and page properties.

To change a page's set-up:

- Choose "File > Page Setup..." and select the desired tab.

If desired, select a "background" that best represents the new screen (choose "File > Page Set-up > Page Properties" and select a background (for specific use cases) from the drop-down menu (See [Using Backgrounds](#) for more information about backgrounds).



Select a tab to change page set-up properties.

Adding Content

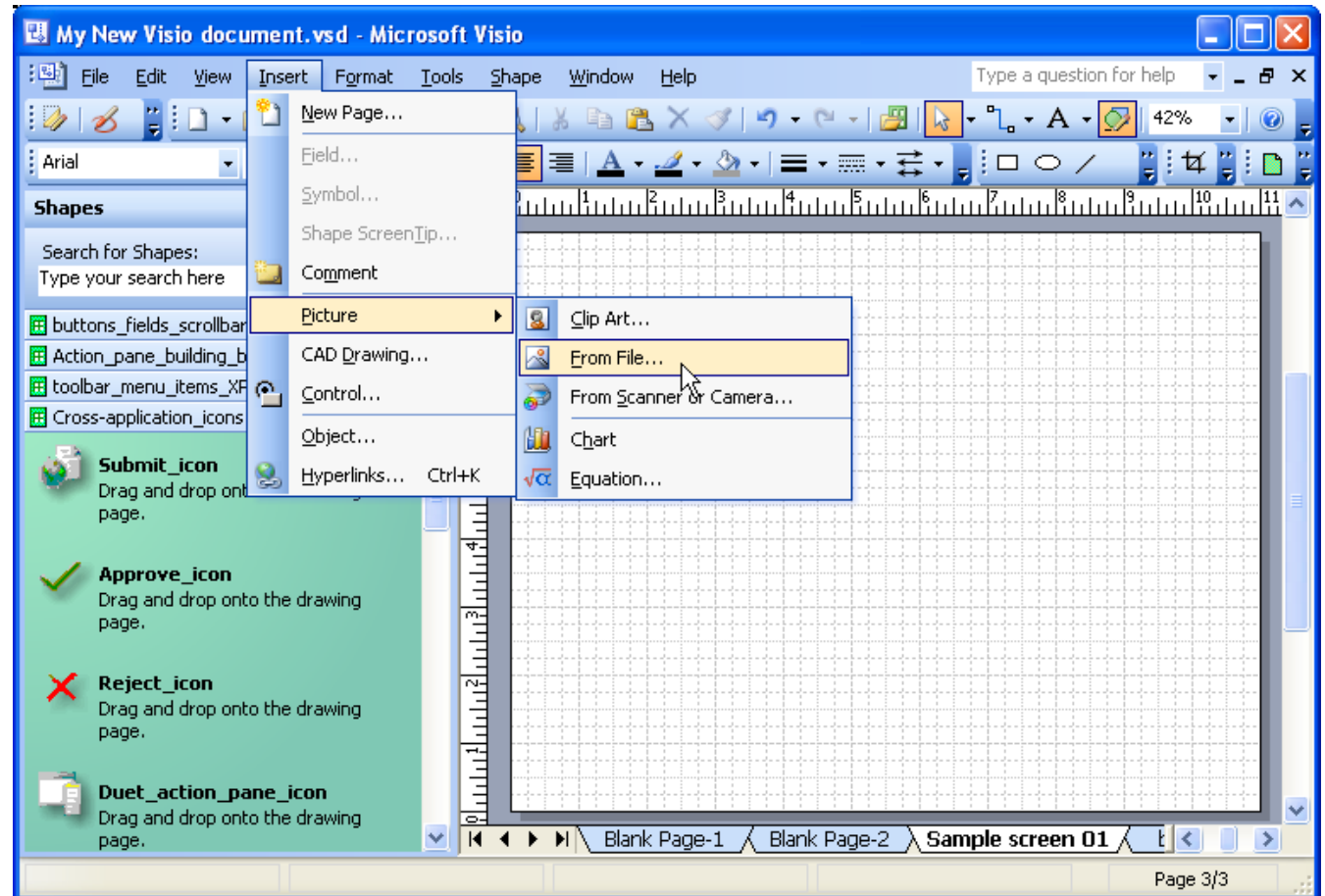
Add content by either importing an image file (choose “Insert > Picture > From File...”) or by using Visio-based “stencils”.

Visio also has text-formatting and drawing tools that can also be used to create and add content.

To import an image file:

There are several methods for importing images,

1. Import an image file by choosing “Insert > Picture > From File...” and navigating to the desired file.
2. Or, drag-and-drop a stencil element or “shape” (see [Using Stencils](#) for more information).

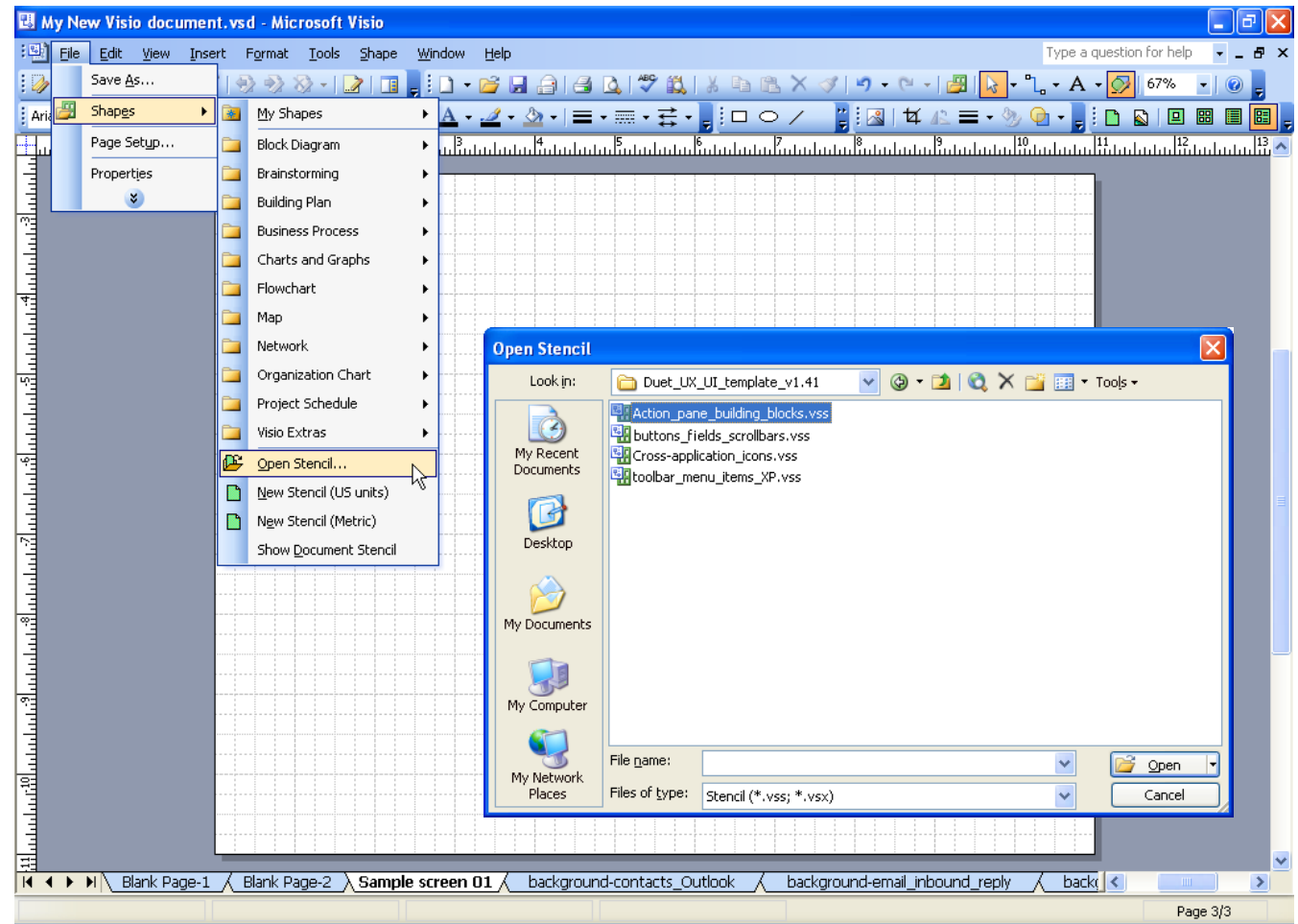


Using Stencils

Use stencils to add screen elements or “shapes” (see [About Shapes](#) for more information). In addition to the Visio-based generic stencils, the template comes with four custom stencils that contain specific building blocks for constructing Duet-style screens: Action_pane_building_blocks.vss; buttons_fields_scrollbars.vss; toolbar_menu_items_XP.vss; cross-application_icons.vss).

To open a stencil:

1. Choose “File > Shapes > Open Stencil...”
2. Navigate to and select the desired stencil.
3. Click “Open”.



About Shapes

The template stencils contain various elements and building blocks known as “shapes” used to create Duet-style screens. Shapes range from simple (such as a mouse pointer) to complex (a grouped shape for the Duet Toolbar—see [About “Grouped” Shapes](#) for more information).

Each shape is named to describe its form and function (for instance, “scroll_bar_vertical” is a shape representing a vertical scroll bar).

Note:

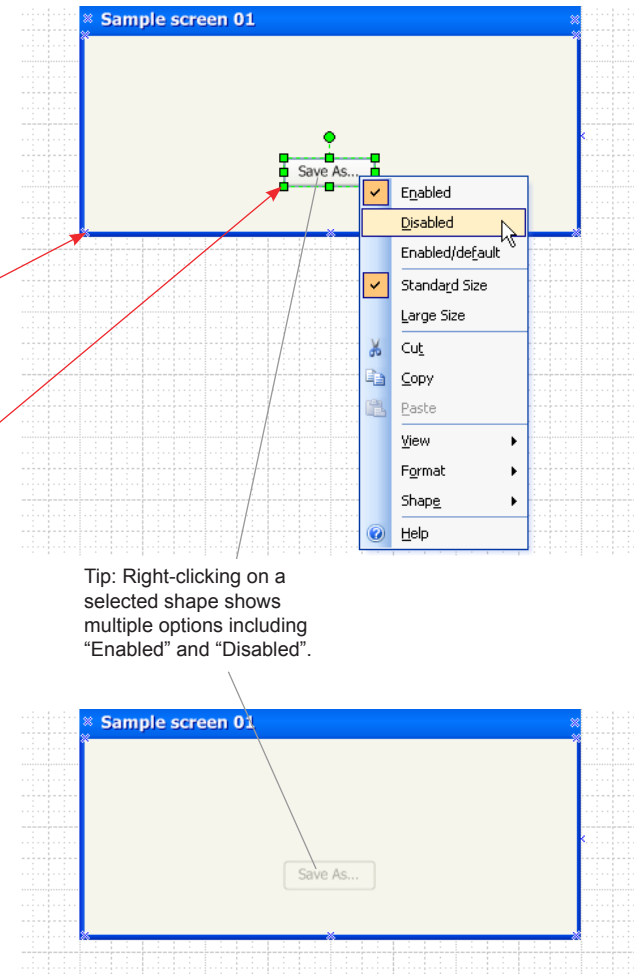
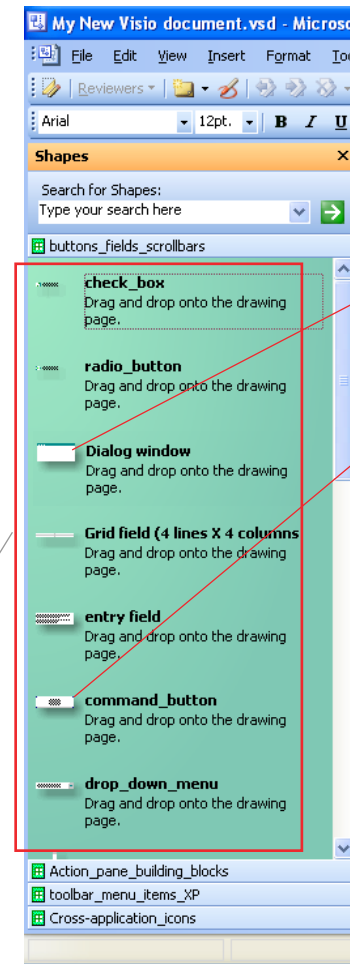
Many shapes have text fields and regions that can be edited. These are bracketed throughout as follows: {enter text}. Simply use the text tool to select the bracketed text to edit it (and don’t forget to delete the brackets as well—these are simply indicators as to where text is “editable”). The font used for Duet-style screens is 8 pt. Tahoma.

Tip:

Many shapes can be toggled between two or more states (enabled, disabled, etc.) by right-clicking to reveal the options drop-down menu.

Likewise, many text fields are designed to expand or contract as new text is entered.

Shapes are stored in the stencils and are drag-and-dropped onto a page.



About “Grouped” Shapes

Many shapes used in this template are actually “grouped” sets of multiple shapes, often with multiple editing options.

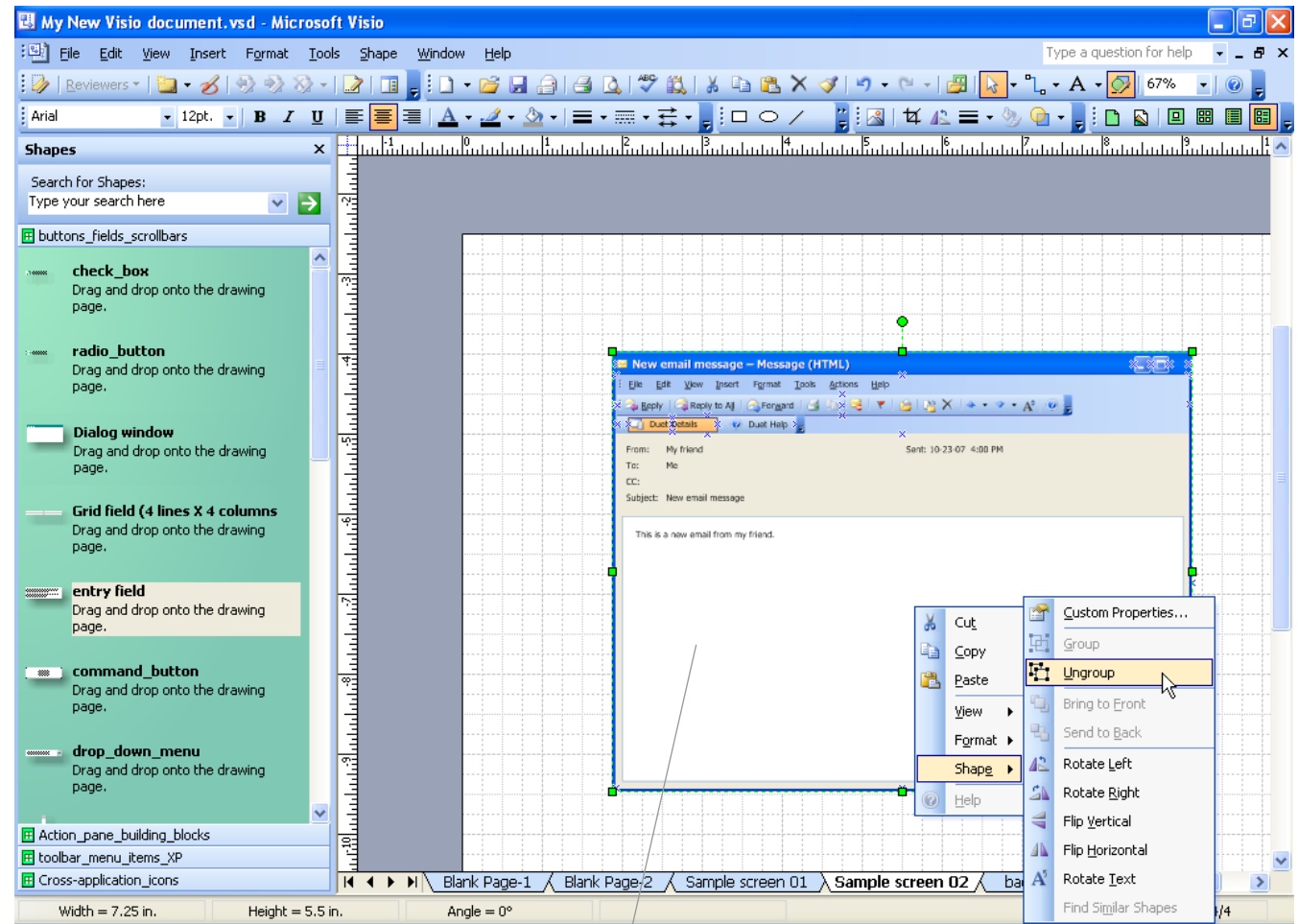
Often you may wish to group or ungroup specific shapes (it's a good idea to group nested sets of shapes so they can't be accidentally moved or edited).

To group and ungroup shapes:

1. Select the object or objects to be grouped or ungrouped
2. Right-click and choose Shape > Group/Ungroup.

Tip:

Many standard Windows-based commands (such as “shift-clicking”) allow for multiple selections, cycling down through a set of grouped shapes, and so forth.



This is an example of a “grouped” shape (multiple shapes have been used to create the screen, then “grouped” together).

Exporting files to .png format

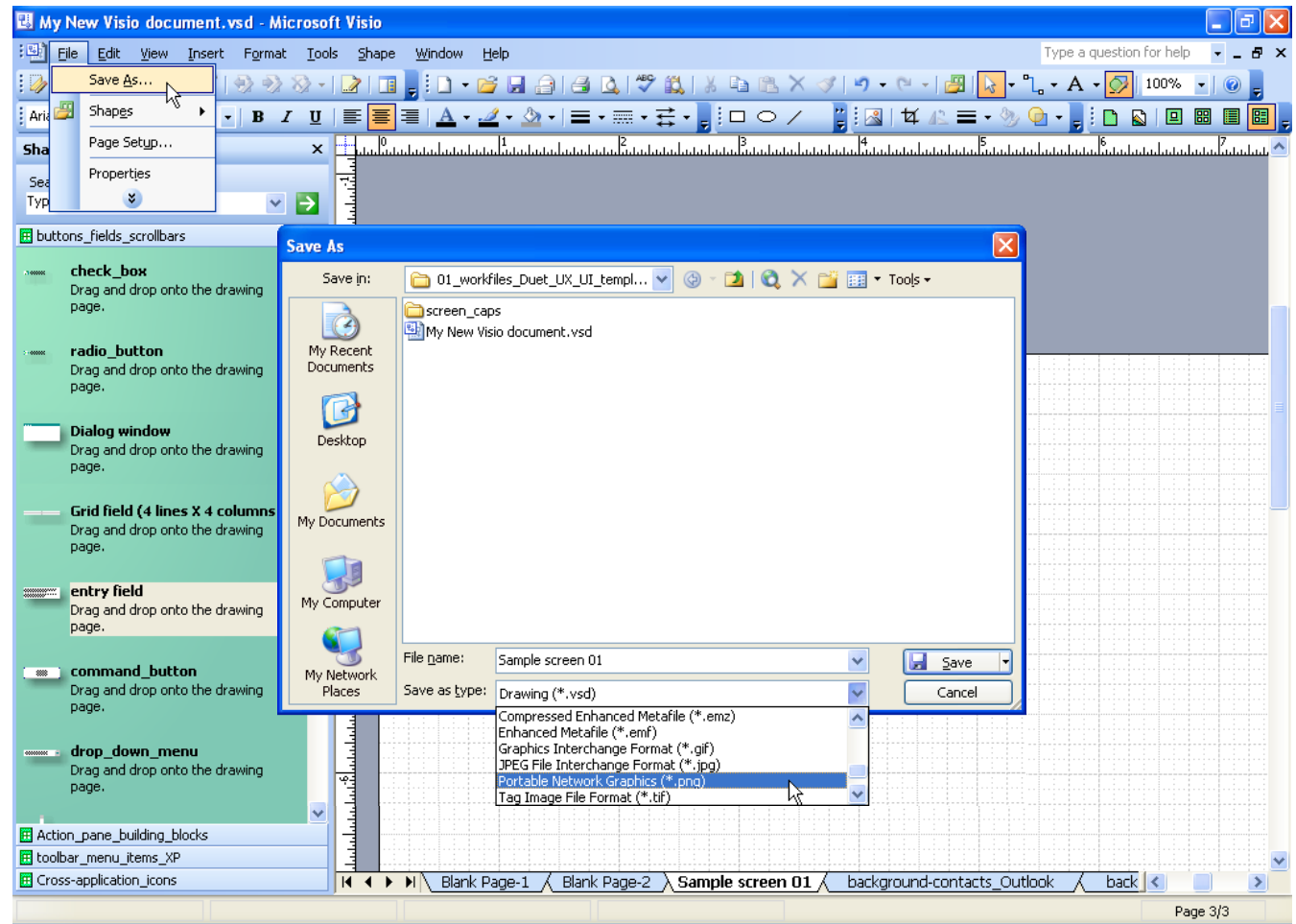
We recommend exporting finished screens to .png image format. After the screens have been saved as images, they can be easily imported into a storyboard PowerPoint document.

To export a finished screen:

1. Make sure the desired page is selected,
2. Choose "File > Save As..."
3. Enter the desired file name (in this case, "Sample screen 01"), and select "Portable Network Graphic (*.png)" from the drop-down menu.

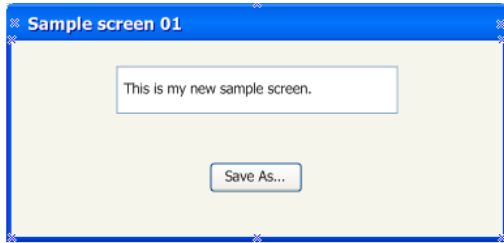
Note:

Unfortunately, Visio can only export one page (screen) at a time. Currently, there is no option for batch export.



Tutorial: Create a Simple Screen

The next few pages will guide you through the creation of simple screen (finished version shown below).

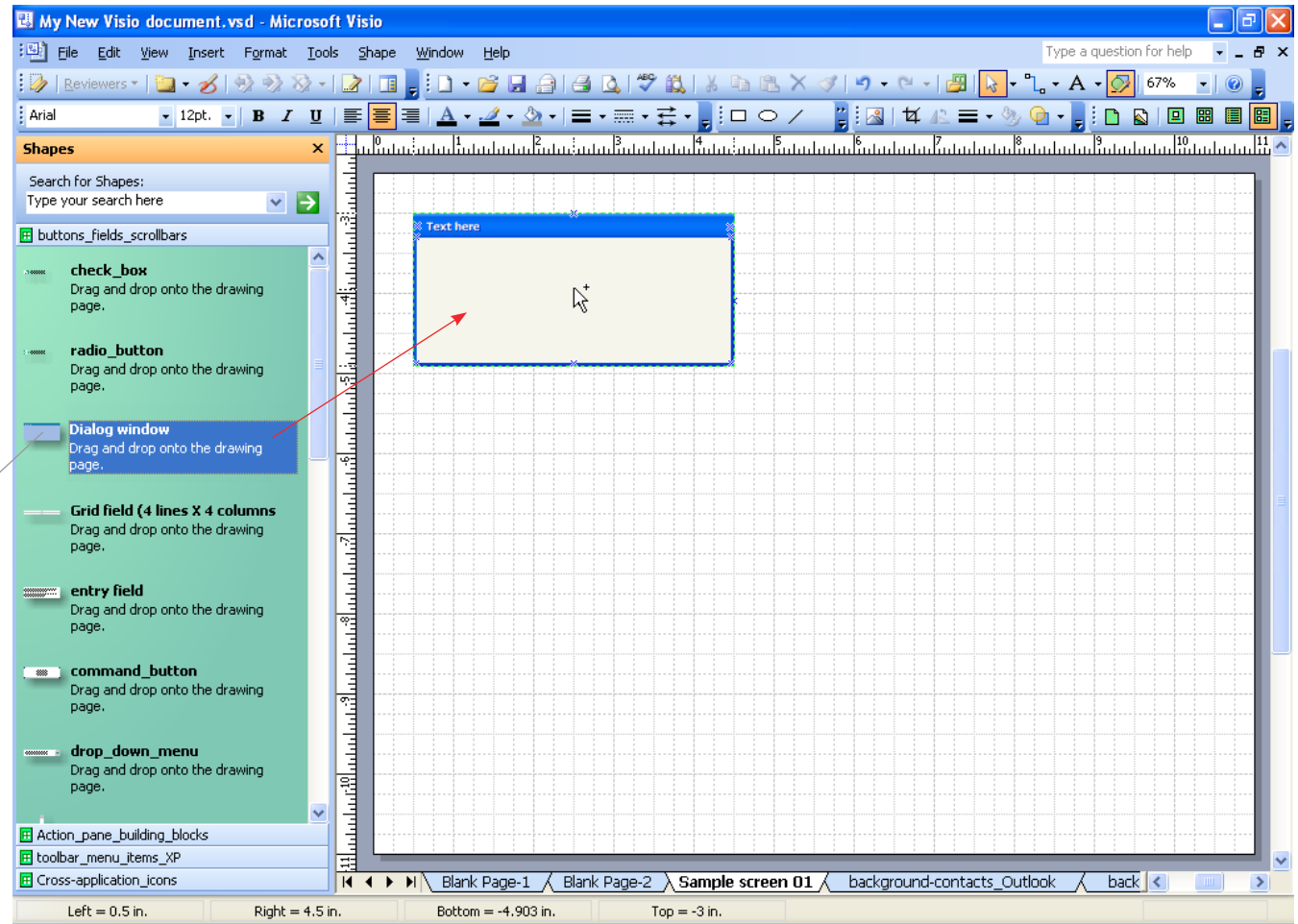


Add a Dialog Window Shape from a Stencil

To add the Dialog window shape:


1. Create a new page and name it "Sample screen 01".
2. Open the buttons_fields_scrollbars stencil.
3. In the stencil, click on the "Dialog window" shape to highlight it.
4. Drag-and-drop the highlighted shape onto the new page.

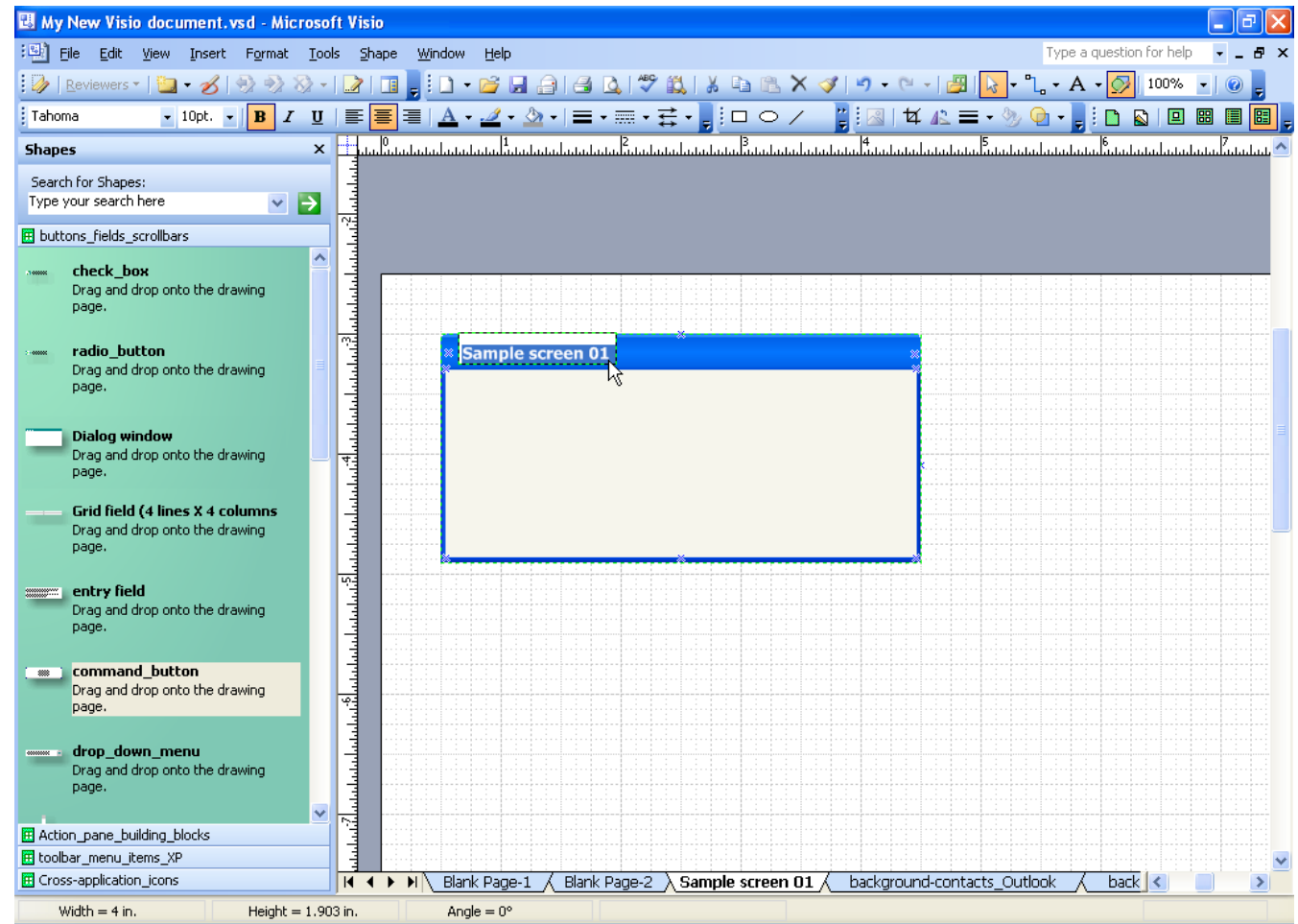
Select, then drag-and-drop the "Dialog window" shape.



Edit the Dialog Field Header Text

To edit the dialog field header text:

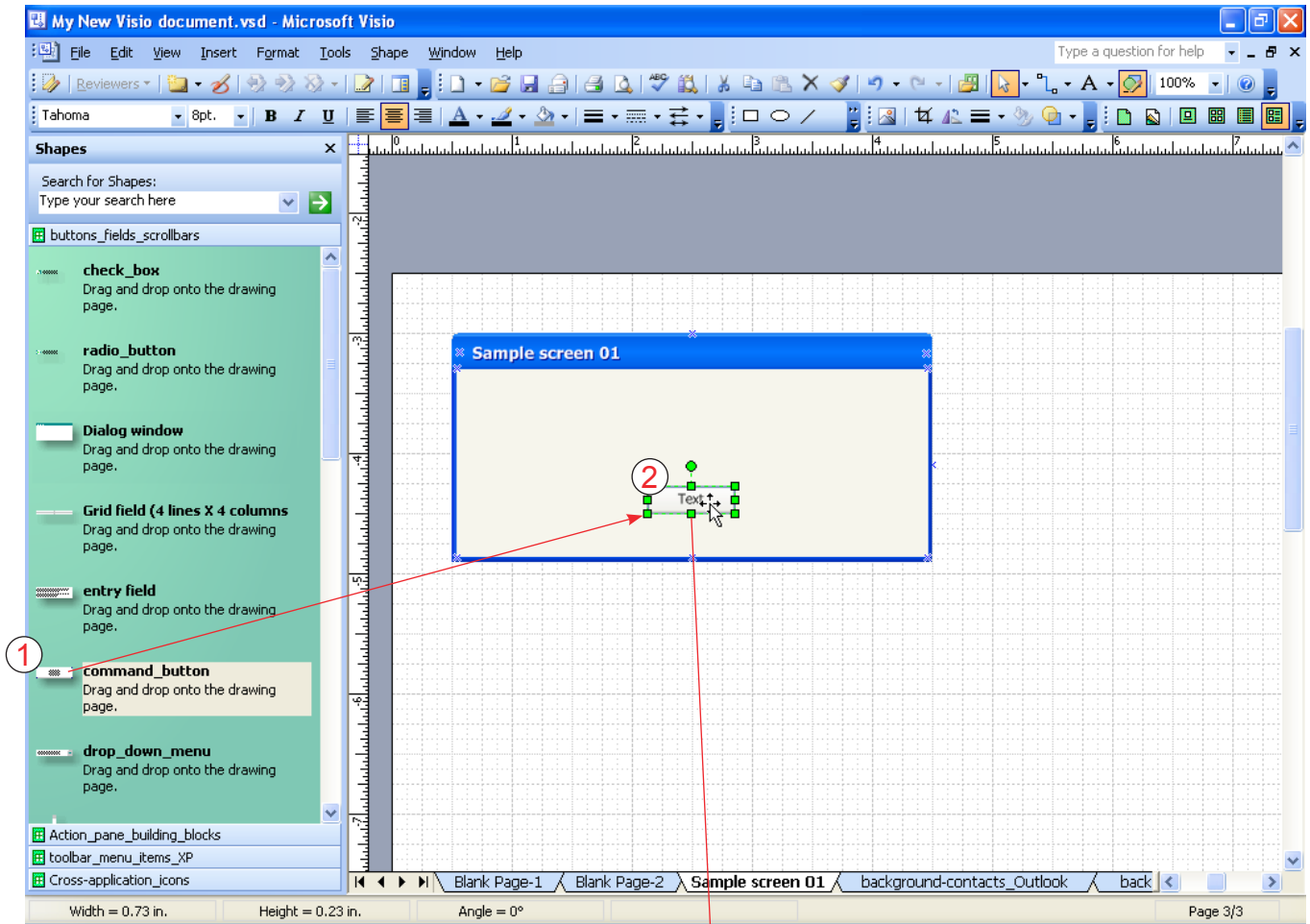
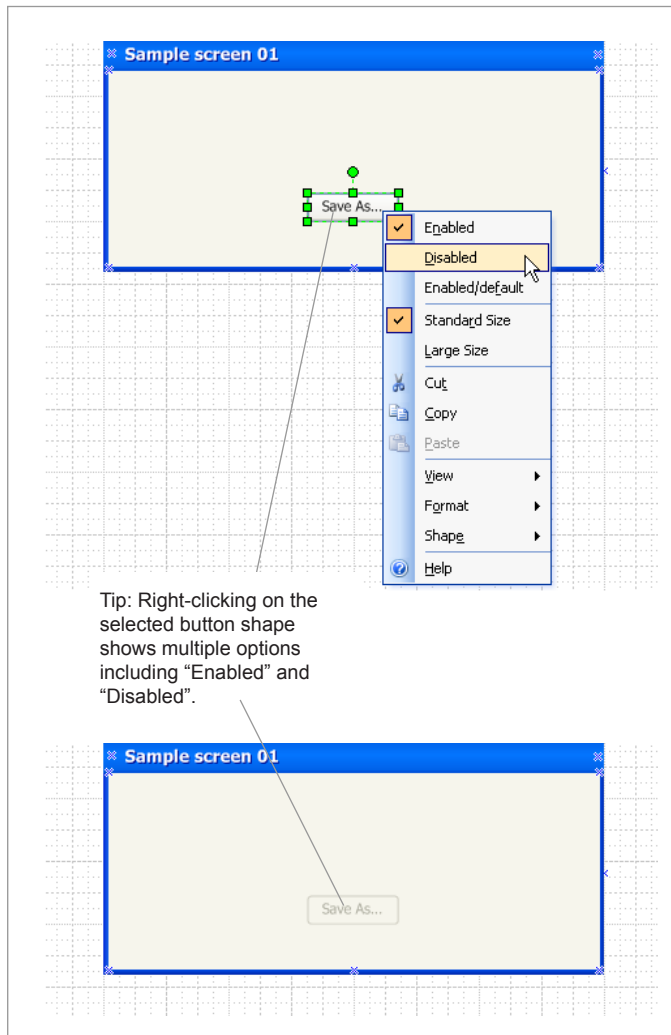
1. Select the text tool. 
2. Double-click "text here" in the header of the Dialog field shape to highlight it.
3. Key in the desired text, in this case, "Sample screen 01".



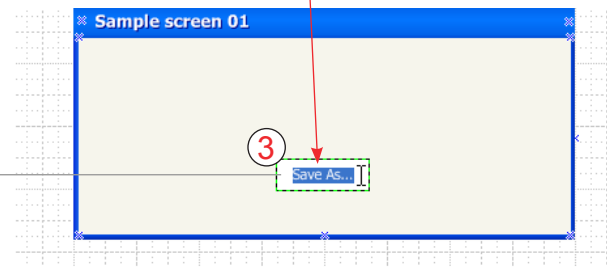
Add and Edit a Command Button

To add and edit a command button shape:

1. Click on the “command button” shape in the buttons_fields_scrollbars stencil to highlight it.
2. Then drag-and-drop the shape onto the dialog field shape already on the page.
3. Use the text tool to highlight and change the button text, in this case “Save As...”.



Use the text tool to highlight and change the button text, in this case “Save As...”.

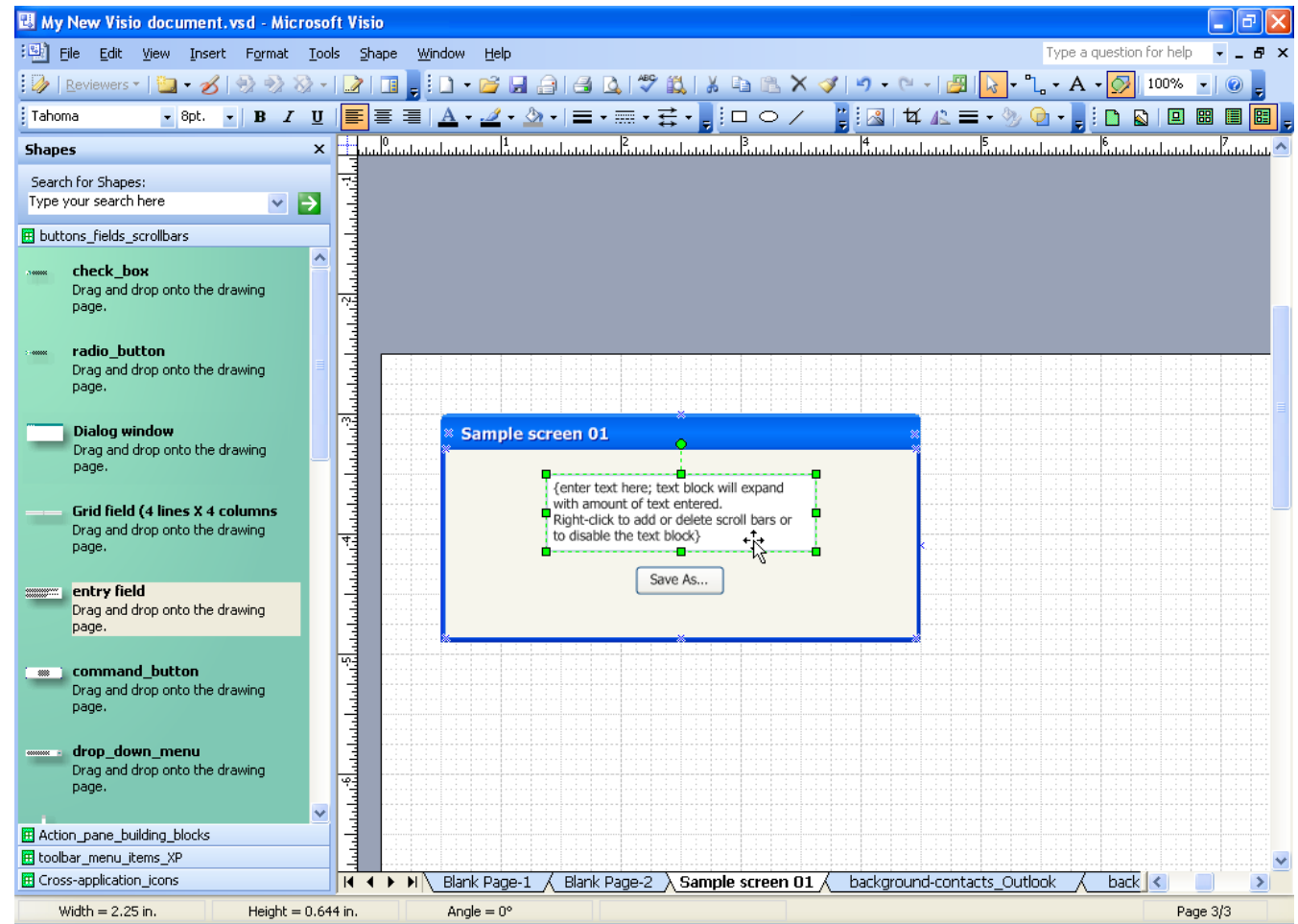


Add and Edit an Entry Field Shape

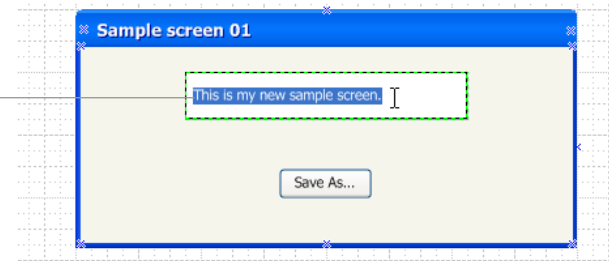
To add and edit an entry field shape:

1. Click on the “entry field” shape in the buttons_fields_scrollbars stencil to highlight it.
2. Then drag-and-drop the shape onto the dialog field shape already on the page.
3. Use the text tool to highlight and change the entry field text, in this case “This is my new sample screen”.

Your new screen is now complete and can now be exported in .png format.



Use the text tool to highlight and change the button text, in this case “This is my new sample screen”.

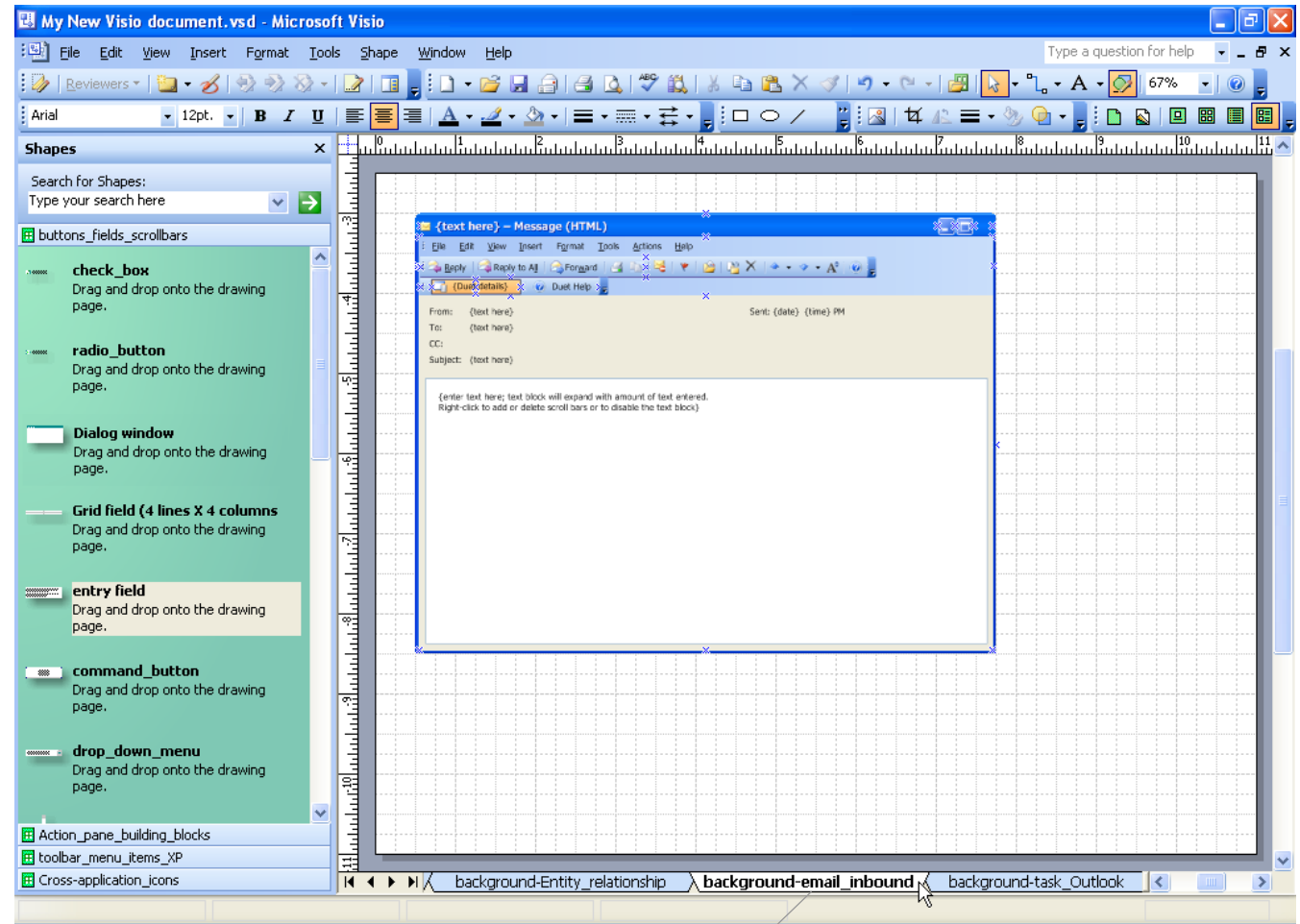


Using Backgrounds

The template includes a number of “backgrounds”—pages containing pre-packaged screens that contain many of the basic Outlook screens, including various contacts, e-mail, tasks and appointment screens, a sample Entity Relationship Diagram (ERD), and a sample Duet Action Pane. These screens are designed to be copied and pasted into new pages with most of their elements being “editable”.

Note:

You can apply a background to a “live” page using the page setup options (this will place a static version—meaning the “live” page maps to the selected background screen elements on the desired page) or, navigate to a specific background page by clicking a background page tab, and then select, copy and paste the background page elements into the desired page (the text fields, tool bars, and regions will remain editable).



Select a background page tab for a specific use case.

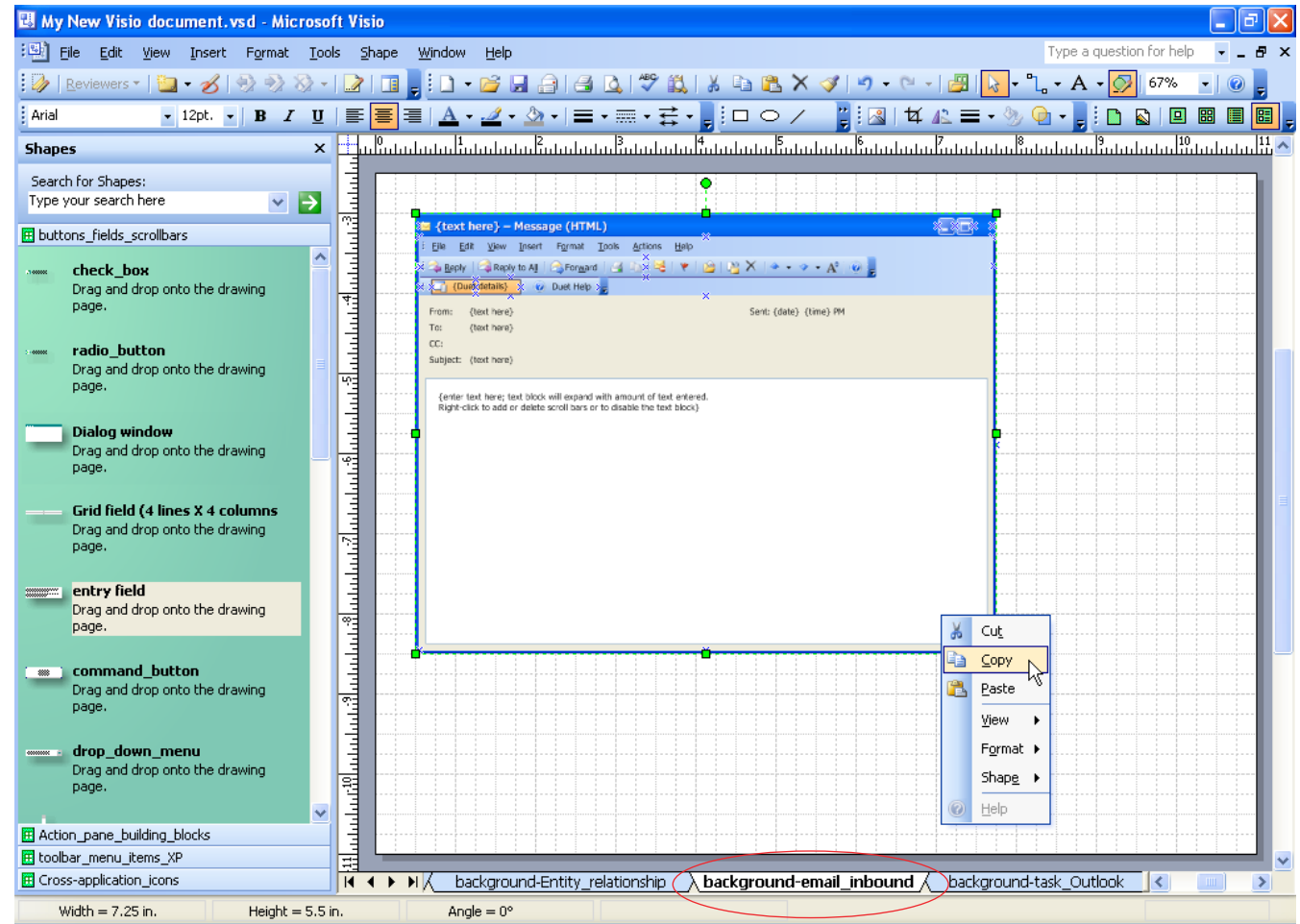
Copy and Paste a Background image to a “Live” Page

To copy and paste a background image:

1. After navigating to the desired background image, select it and right-click to copy it to the clipboard.
2. Navigate to the desired “live” (non-background) page and right-click to paste it there.

Tip:

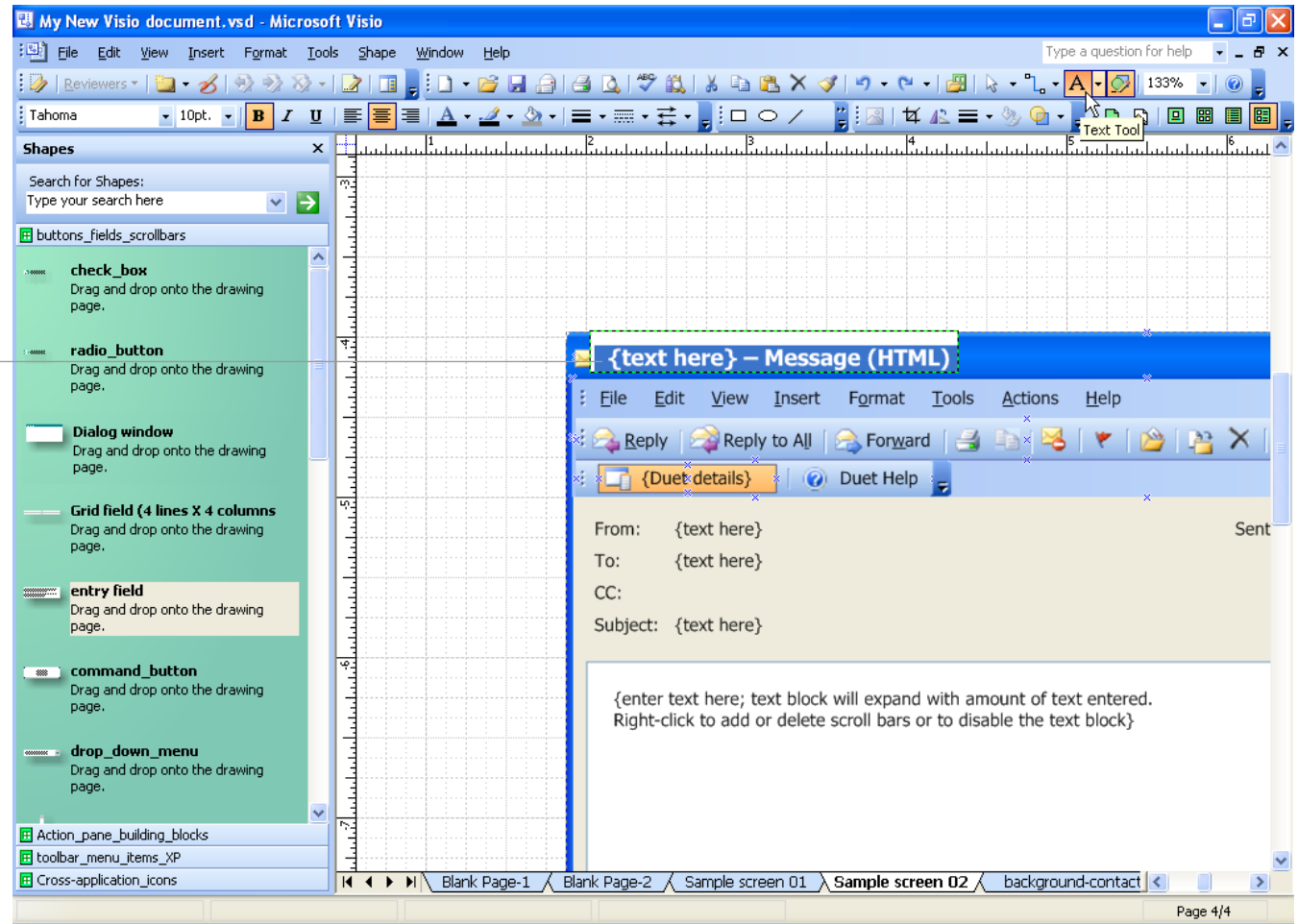
Most Windows-specific options (key commands and menu options) work for this as well.



Edit a Background Image

Once pasted into a “live” page—or while on the background page itself—various fields and options are “editable” (these are surrounded by brackets—don’t forget to delete the brackets!).

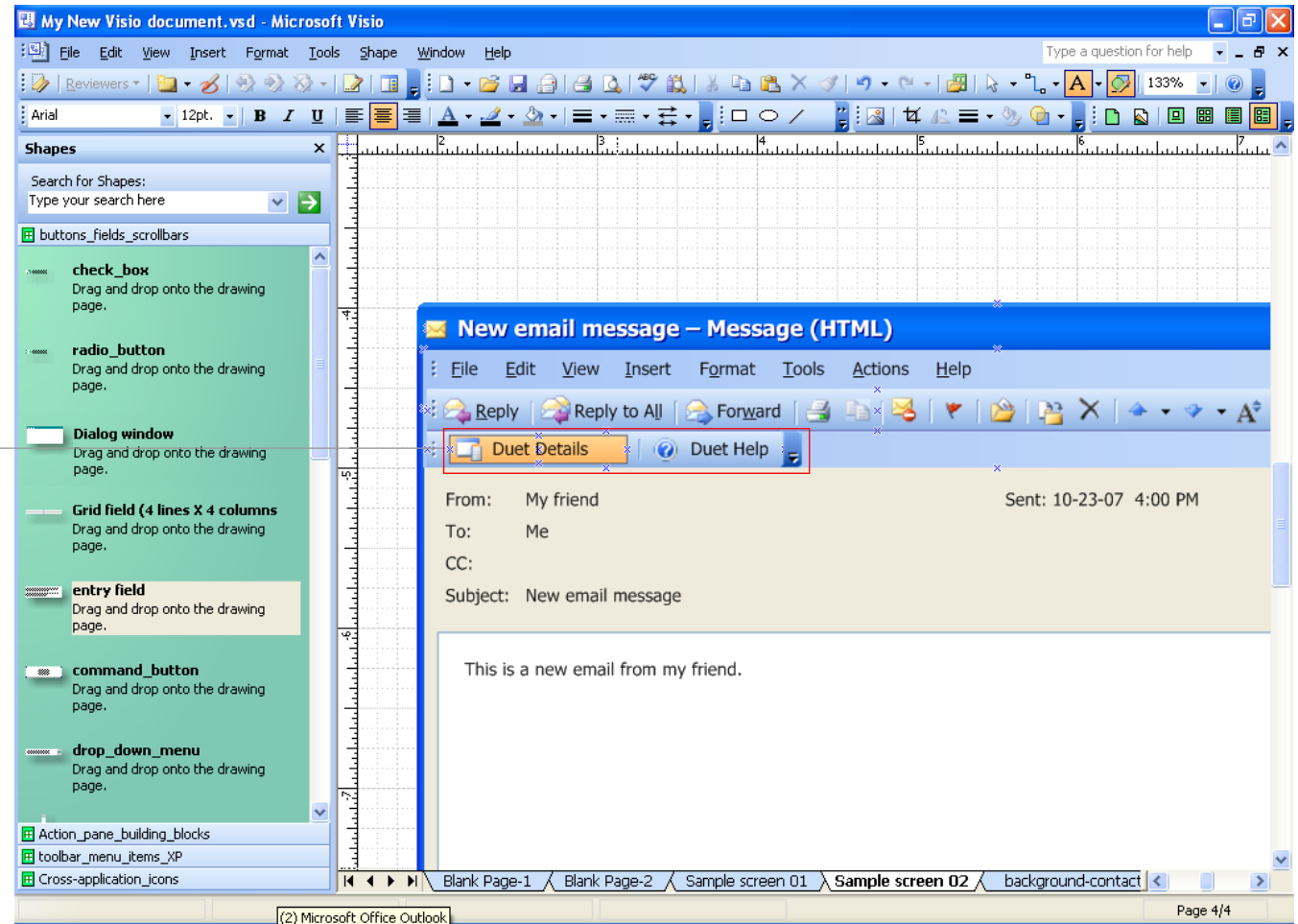
Select the various fields (surrounded by brackets) to edit them.



Specific Use Cases

The template also contains items and screens for specific use cases including the Duet Toolbar, the Duet Action Pane, and a sample Entity Relationship Diagram (ERD).

The Duet Toolbar is included in many of the background screens.



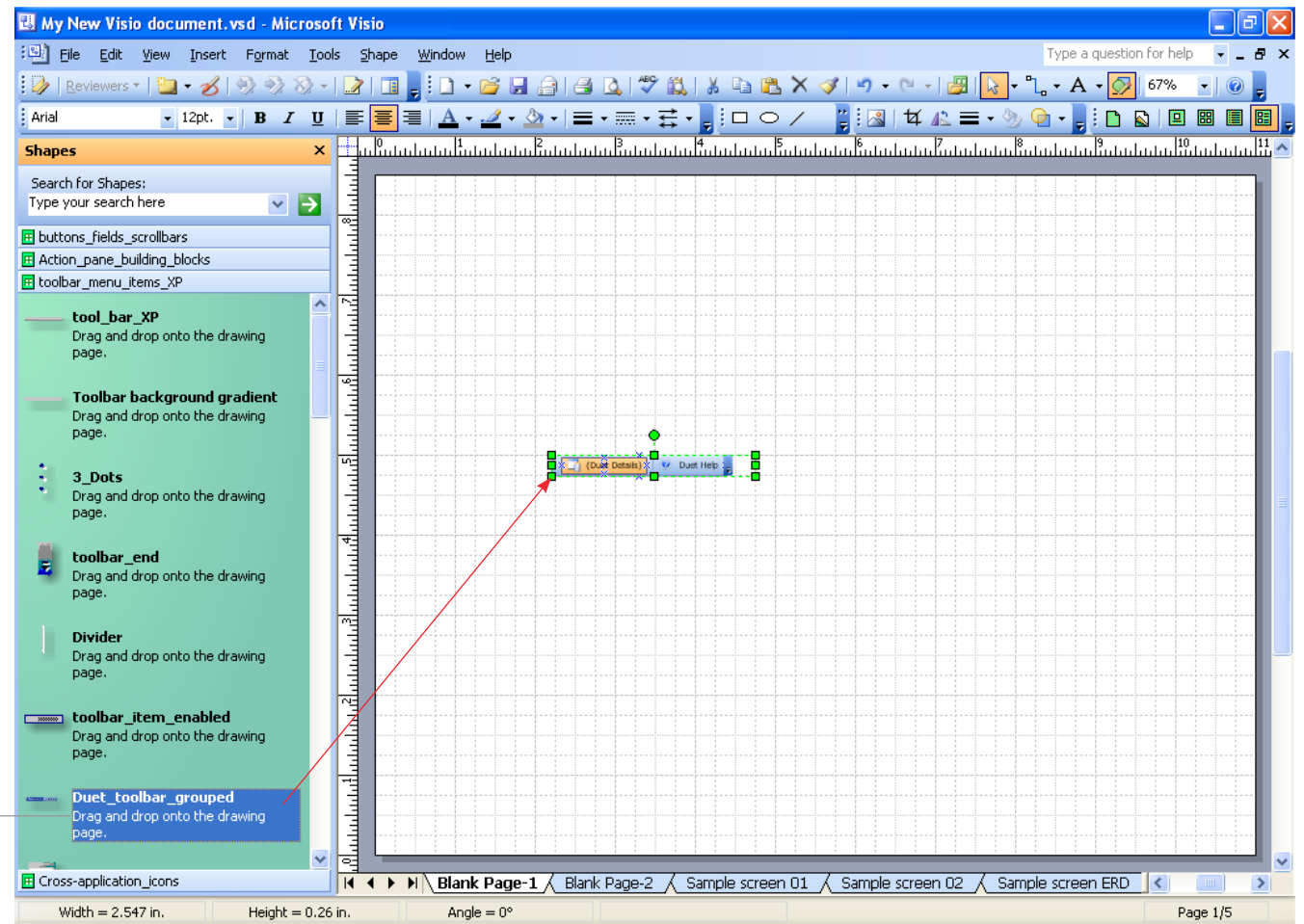
The Duet Toolbar

Most of the pre-packaged screens also include the Duet Toolbar; this is also included as a grouped “shape” in the toolbar_menu_items_XP stencil and can be added and tailored as necessary.

For additional information, visit the Toolbar Guideline page on the Duet User Experience Wiki:

<https://wiki.wdf.sap.corp/display/Duet/Duet+Toolbars>

The Duet Toolbar is a grouped set of shapes and can be dragged-and-dropped from the stencil as desired.



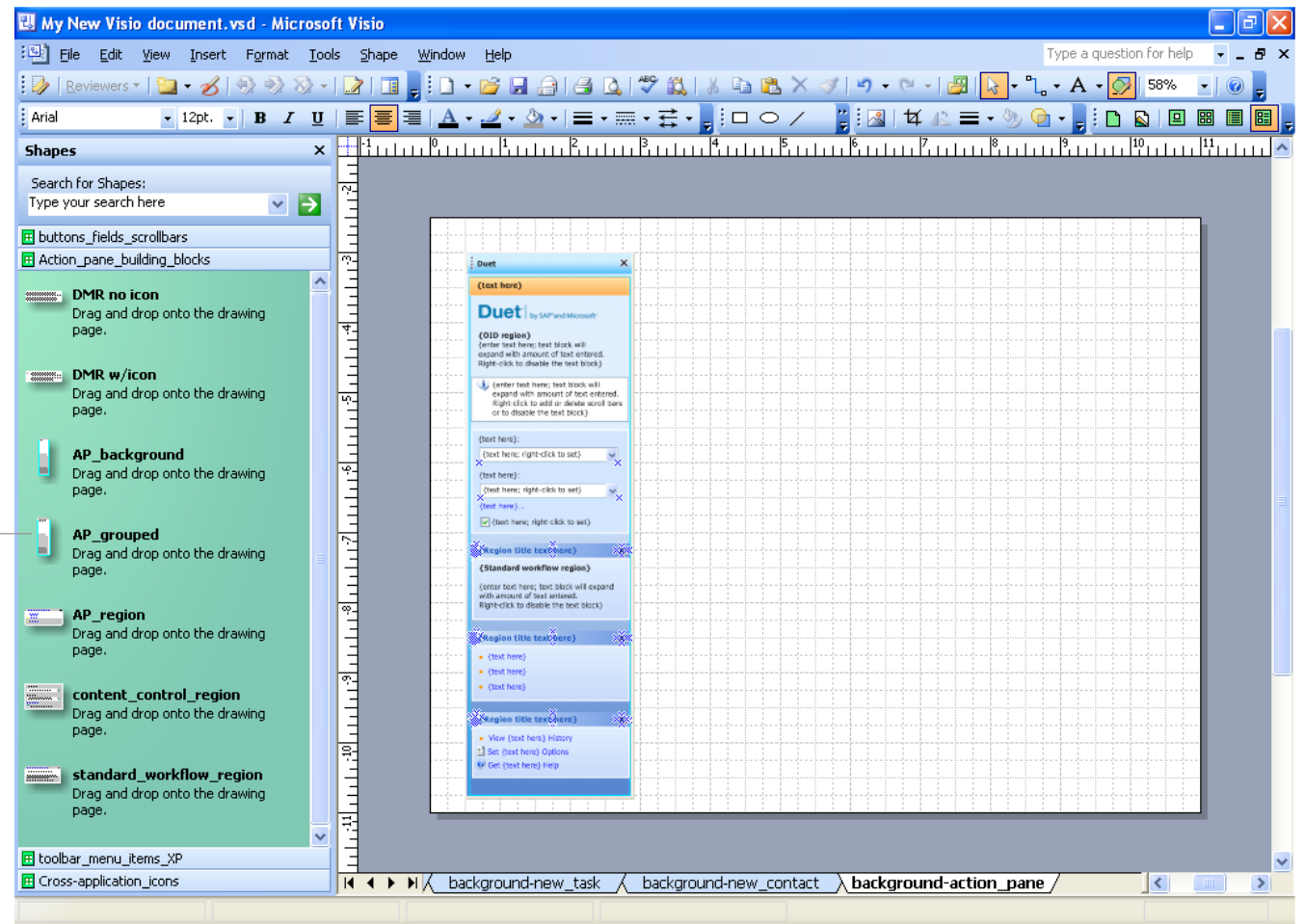
The Duet Action Pane

The Duet Action Pane uses specific shapes for the different regions that can be included; these can be found in Action_pane_building_blocks stencil and can be added and edited as necessary.

For additional information, visit the Toolbar Guideline page on the Duet User Experience Wiki:

<https://wiki.wdf.sap.corp/display/Duet/Duet+Action+Pane>

The Action_pane_building_blocks stencil contains many of the regions used in the Duet Action Pane.



The Entity Relationships Diagram (ERD)

An entity-relationship model (ERM) is a conceptual representation of structured data and is illustrated as an entity-relationship diagram (ERD). The ERD's purpose is to deliver a requirement analysis of a proposed design's overall function and process. The template supplies a background page with a basic ERD set-up.

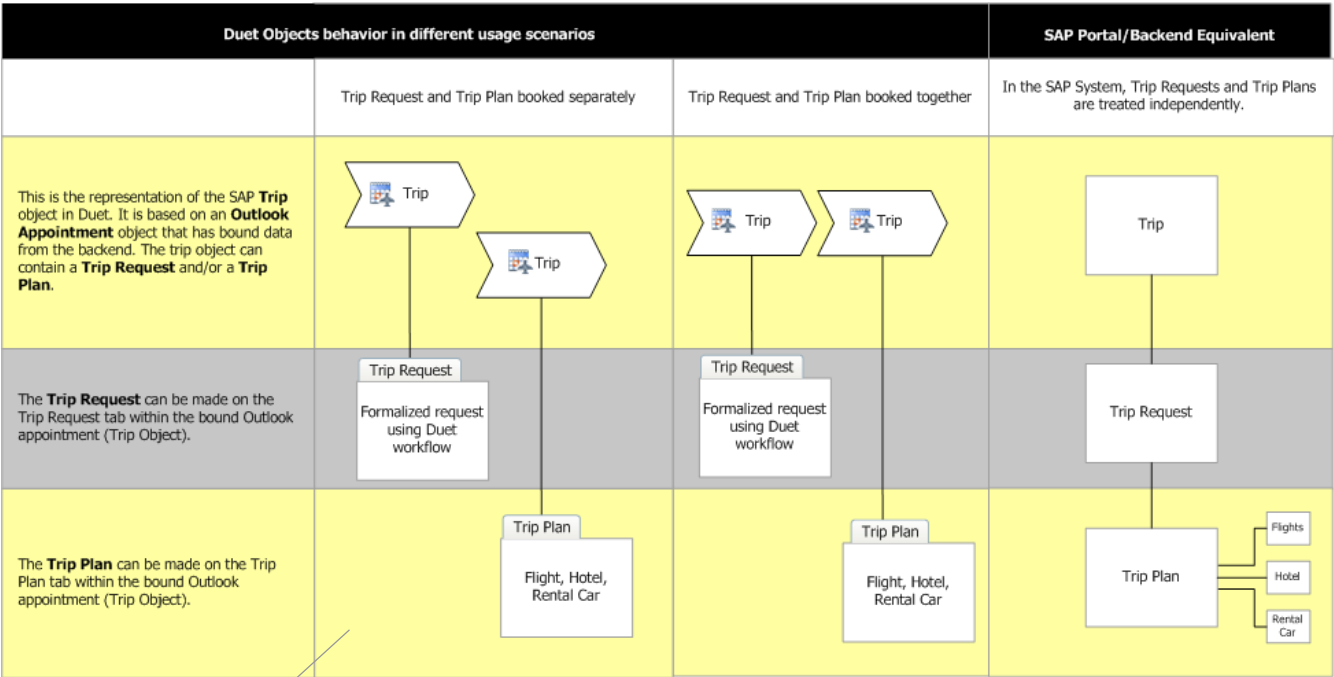
Entities and Relationships

An entity can represent a discrete item (such as Outlook objects), backend data repositories, InfoPath forms, server- and client-side operations, and so forth. Entities are usually represented in the ERD as rectangles.

A relationship captures how two or more entities are related to one another, and are usually represented as diamonds, connected by lines to each of the entities in the relationship.

What the ERD Illustrates

The ERD serves as an overview illustrating key design entities and their various roles and functions relative to each other. For example, the ERD can illustrate the relationships between “backend” SAP entities and their Duet/MSFT Office equivalents and, much like a wire-frame, outline the necessary data requirements.



This is an example ERD from the Duet Travel Management scenario.


Appendix A: Commonly Used Duet Shapes

Below is a partial list of shapes used to create Duet-style screens; each is followed by a link to the relevant UX Guidelines wiki page.

DMR no icon

{enter text here; text block will expand with amount of text entered. Right-click to add or delete scroll bars or to disable the text block}

DMR w/icon

 {enter text here; text block will expand with amount of text entered. Right-click to add or delete scroll bars or to disable the text block}

[https://wiki.wdf.sap.corp/display/Duet/Dynamic+Message+Region+\(DMR\)](https://wiki.wdf.sap.corp/display/Duet/Dynamic+Message+Region+(DMR))

Content control region

{text here}:

{text here}:

{text here}...

☒ {text here; right-click to set}

<https://wiki.wdf.sap.corp/display/Duet/Content+Controls>

Standard workflow region

{Region title text here}

{Standard workflow region}

{enter text here; text block will expand with amount of text entered. Right-click to disable the text block}

<https://wiki.wdf.sap.corp/display/Duet/Workflow+Region>

AP_region

{Region title text here}

- {text here}
- {text here}
- {text here}

<https://wiki.wdf.sap.corp/display/Duet/Link+List+Region>

Dialog window

Text here

<https://wiki.wdf.sap.corp/display/Duet/Duet+Dialog+Windows>

AP_background

Duet

{text here}

<https://wiki.wdf.sap.corp/display/Duet/Duet+Action+Pane>

Appendix B: List of Included Background Screens

Background screens include:

Background-action_pane

Background-contacts_Outlook

Background-email_inbound

Background-email_inbound_reply

Background-email_outbound

Background-Entity_relationship

Background-Homepage_01

Background-Homepage_02

Background-Homepage_03

Background-InfoPath_01

Background-InfoPath_02

Background-new_appointment

Background-new_contact

Background-new_task

Background-task_Outlook

Background-workflow_01

Background-report_template_catalog

Background-catalog_template_inspector

Background-scheduled_report_inspector

Background-open_in_Excel

Background-budget_alert_mail_spec_01

Background-budget_alert_mail_spec_02

Appendix C: Useful Links

Here are some useful links for more information on how to design for Duet and using Visio:

<https://wiki.wdf.sap.corp/display/Duet/The+Fundamental+Principles+of+Duet+Scenarios>

<https://wiki.wdf.sap.corp/display/Duet/Getting+Started+with+Duet+UX+Design>

<https://wiki.wdf.sap.corp/display/Duet/The+Duet+Scenario+Design+and+Definition+Process>

<https://wiki.wdf.sap.corp/display/Duet/Duet+User+Experience+Guidelines+and+Resources>

<http://office.microsoft.com/en-us/visio>

<http://visio.mvps.org/>

<http://www.visiocafe.com>