Document

This documentation will reveal what documents actually are, how they are created, how to replace and delete content, while also explaining the differences between different types of content. Here you will also discover how to specify the document settings and how to check out and check in documents.

What is a document?

Documents are files which are managed in the Curator. They primarily refer to files which were created with tts performance suite – in other words, e-learning lessons, documentation and guides. It's also possible to upload so-called third-party documents (such as Word, Excel or PowerPoint files) from your hard drive to tts performance suite. A third type of document just comprises a set of meta data plus a link to a website or resource (URL document).

How to create a document?

Whenever you insert a new document while in the **Curator** view, a Wizard appears to guide you through all the other steps. This is where you make the first settings:

- Step 1: document type
- Step 2: properties (metadata)
- Step 3: document content (Producer document, file – such as a PDF file – placeholder).

If you would like to create a document that comprises just meta data and a link, you have to specify a corresponding document type in step 1 (see below: URL document).

The precise implications of these initial settings will be explained in the following section.

1 Document types

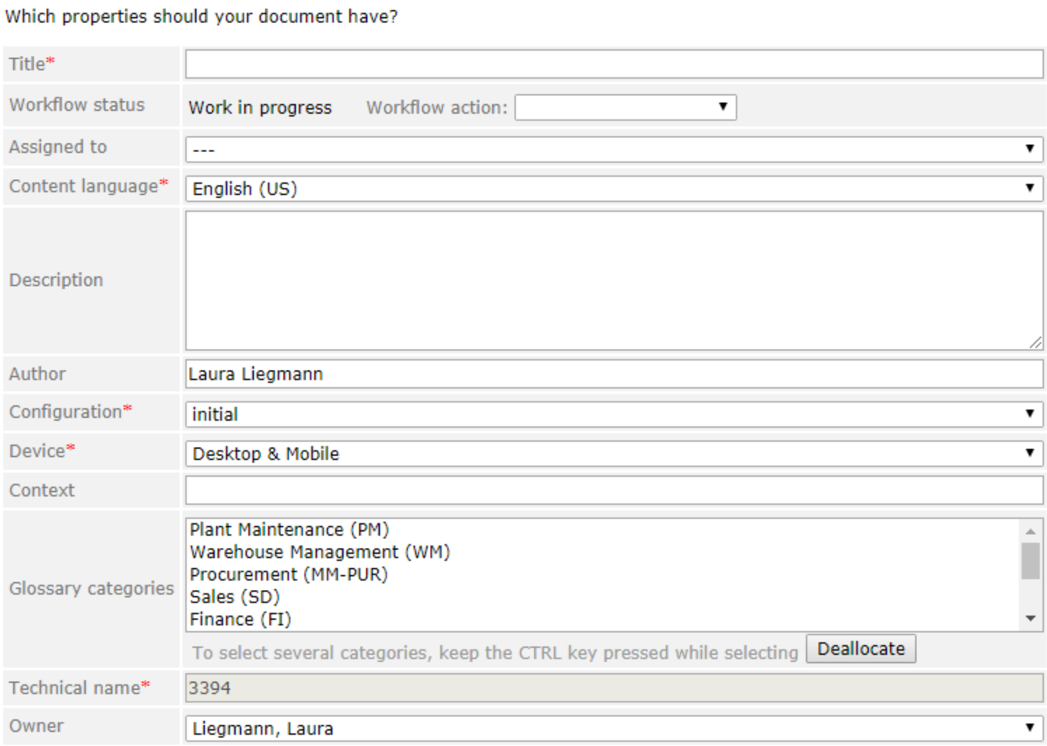
The document type is one of the main distinguishing features of a document. Among other things, it defines which metadata (properties) a document is allowed to have, in which repositories it can be stored and identifies the workflow upon which the document is based. Your administrator will have already specified the document types from which you can choose.

2 Main metadata

The main metadata (document properties) describe the document in greater detail, such as specifying its title and language.

Mandatory settings include the title, language and technical name (technical name is generated automatically). The configuration determines which other attributes the document will have and which of these are mandatory fields. Mandatory fields are highlighted with a red star. Please note the importance of specifying meaningful properties as they will make it easier to search for documents again later.

The **Workflow status** indicates the handling status of the document and how it is to be processed further. The workflow is defined by the administrator. It is set to the defined original status when creating a document.



Other attributes that may be available, depending on the configuration, include:

Owner
The creator of a document is automatically regarded as its owner by default. Please note that the selection list for the owner is limited to the circle of users who have editing rights for the particular document type. Other owners cannot be selected.

Assigned to
The person to whom the document has been assigned can be noted here. Please note that the selection list for the "Assigned to" field is limited to the circle of users who have editing rights for the current workflow status.

Author
The person who creates the document is listed as the author in this field (as a string). It's possible to overwrite the field. The settings can be used to specify whether the full user name (first name, last name) or the reverse user name (last name, first name) is to be displayed here.

Configuration
The Configuration field shows the configuration that has been assigned to the document. Only one configuration can be assigned to a document.

Context
Here you can see the position in the IT application where the document is displayed. This field is automatically filled in during the recording, but it can also be edited manually.

Glossary categories
Various glossaries can be assigned to the document in this field: Technical terms used within your document can be linked to the respective glossary in this manner.

3 Content

Once you have defined the document type and the main metadata, the next step involves selecting the content. Here, the term "content" refers to the kind of document you want to create. You can:

- create a new **Producer document** which is then opened directly for editing in the Document Editor,
- upload an **external file** from your file system,
- create an empty **placeholder** which can be subsequently filled with content at any time, or
- insert a **URL document**, in order to access an external page via a hyperlink.

3.1 Producer document

If you have selected the **Create Producer document** option, steps involving other property settings for the document will then be opened. The first thing you have to do is to select a template for a Producer document, assuming that more than one template exists. Options involving the e-learning, documentation and publishing are then displayed. The standard settings will be used if these settings are not changed.

When finished, the Edit view of the Document Editor opens directly and you can get down to work on the document. If you want to subsequently edit the document properties, use the permanently visible **User menu** button, which is located just above the menu ribbon.

Having created the document content, you can transfer the document to the Curator via the **Upload** button. Since this button is part of the Standard toolbar, it is visible in every perspective.

3.2 External file

External files are files which are stored in the file system of your hard drive and not in tts performance suite. You can select the desired file by clicking the

Upload file option. It is also possible to upload content packages (file ending: .ttcp) that you created with tts performance suite. These are recognized as Producer documents.

You can also use upload several files in a **ZIP package**. This involves using the "Zip archive to be unpacked on server" option. This ZIP package is then automatically unpacked and the various files are stored in the document repository. You can use a ZIP archive to upload HTML files with additional resources or even Web-Based Trainings (WBTs) from a third-party provider, for example.

To clearly define which file is to be displayed via the portal, the convention dictates that the file with the name **index.html** is automatically opened. This explains why you may have to rename the start file in the Zip package to "index.html".

You are advised to structure the ZIP package in the following manner when dealing with a WBT import. The highest level should include:

- a **folder** (e.g. content) with the complete WBT that is to be imported
- an **index.html** which refers to the start file of the WBT in the above folder. The forwarding in the index.html can be structured in the following manner:

```
<html>
<head>
        <meta http-equiv="refresh" content="0; URL='content/xyz.html'" />
</head>
</html>
```

Please note that Web-Based Trainings can only be uploaded via this upload procedure. A SCORM import is not possible.

3.3 Placeholders

Placeholders are primarily used during the **conceptual design phase** of a project, when the actual document files are not yet ready, in order to initially specify the structure. They merely consist of a set of **document properties** (metadata). The actual document file will be added later via the **Append content** button.

3.4 URL document

tts performance suite also allows you to create and maintain objects or documents which are merely hyperlinks to HTML pages in the intranet or internet.

URL repositories are special document repositories which have to be set up by the administrator prior to their initial use. To be able to use this function, at least one **document type** that matches the document repository must be available. In cases where more than one URL repository has been assigned to a document type, an additional step will appear in the creation dialog. This is where you can select the desired repository.

If an 'entry point' (base URL) has been specified by the administrator, you just have to enter the relative link into the **External link** field. For checking purposes, the link address is visible below the input field (generated from the entry point + field entry). To verify that everything is in order, you can click the address (highlighted in red) to access the specified URL directly.