



Documentation and a manual

You can create documentation in the Documentation view and merge it to form a manual. Keep reading to discover basic information about this procedure.

1 Creating documentation via a Producer document

Documentation is created via the Documentation view in the Document Editor. Whenever you record an IT application via the Recording function, the associated images and descriptive text are automatically generated in the documentation. These can then be supplemented with additional explanations or images.

The following **elements** can be used in the documentation:

- text, images and tables
- page and object templates that have a documentation layout
- placeholders for PowerPoint slides

1 Introduction

Step 1



Template: Textbox - Hint

✎ Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque at nisi sit amet eros rhoncus iaculis. Fusce arcu. Proin varius elit sed ligula iaculis euismod.



If you want to use headings in the documentation, you can insert **outline elements** into the step list. These are then displayed as headings in the documentation. The respective levels of the outline elements correspond to heading levels.

Please refer to the help topic with the title **Creating content in the Document Editor** to access further information on working in the Documentation view.

2 Creating a manual

Several documentations can be merged to form a manual. You should use a Course, Topic or Process item to assemble the content. Please refer to the help topic with the title **Structuring and modeling content** for further information on this.

The following example is based on a course that consists of various Producer documents.

Sales Order Processing - Standard Order

Course outline Target groups Properties

- Create customer order**
 - How do I create a customer order? ▶
 - Which status exist for a customer order and where can I see them? ▶
- Check manual pricing condition**
 - How do I enter and maintain prices in a sales order? ▶
- Delivery**
 - Which organizational units are necessary for the shipping? ▶
 - How do I create a delivery without reference? ▶
 - How do I create a delivery with reference to a sales order? ▶
 - How do I display a delivery? ▶
- Picking**
 - How do I pick goods in an inventory management? ▶

The manual for this course can be exported. In doing so, you can choose between the following options:

Create a course manual

1

Options

Here you can choose options for the course manual export.

Please choose your export options:

Target language:	English (US) ▼
Document versions:	<input checked="" type="checkbox"/> Only consider published ones
Attach glossary :	<input type="checkbox"/>
Configuration:	initial ▼

< Back

Finish

Cancel



The manual export includes only Producer documents. External documents, such as Word or PDF documents, are not included in the export.

Headings in the manual are created automatically. The following rule applies:

Course view:

Course categories, courses and course sections are incorporated into the manual as headings.

Process and Topic view:


Processes and topics are incorporated into the manual as headings.

Document:

Within a document, all outline elements or text that have been formatted as a heading will be copied to the manual as headings.

Table of Contents

- 1 CREATE CUSTOMER ORDER 1
 - 1.1 How do I create a customer order? 1
 - 1.1.1 Documentation 1
 - 1.1.2 Create Standard Order: Overview 2
 - 1.1.3 Information 2
 - 1.1.4 Create Standard Order: Overview 4
 - 1.2 Which status exist for a customer order and where can I see them? 4
 - 1.2.1 Display Sales Order: Initial Screen 5
 - 1.2.2 Display Standard Order 13488: Overview 5
 - 1.2.3 Display Standard Order 13488: Header Data 6
 - 1.2.4 Display Standard Order 13488: Overview 7
 - 1.2.5 Display Standard Order 13488: Item Data 9
- 2 CHECK MANUAL PRICING CONDITION 10
 - 2.1 How do I enter and maintain prices in a sales order? 10
 - 2.1.1 Change Sales Order: Initial Screen 10
 - 2.1.2 Change Standard Order 13488: Overview 11
 - 2.1.3 Change Standard Order 13488: Item Data 12
 - 2.1.4 Change Sales Order: Initial Screen 12
- 3 DELIVERY 13
 - 3.1 Which organizational units are necessary for the shipping? 13
 - 3.2 How do I create a delivery without reference? 15
 - 3.2.1 Create Outbound Delivery Without Order Reference 16
 - 3.2.2 Delivery w/o ref. Create: Overview 16
 - 3.3 How do I create a delivery with reference to a sales order? 17
 - 3.3.1 Create Outbound Delivery with Order Reference 18
 - 3.3.2 Delivery Create: Overview 18
 - 3.3.3 Create Outbound Delivery with Order Reference 19
 - 3.4 How do I display a delivery? 19
 - 3.4.1 Display Outbound Delivery 20
 - 3.4.2 Delivery 80016308 Display: Overview 20
- 4 PICKING 22
 - 4.1 How do I pick goods in an inventory management? 22
 - 4.1.1 Change Outbound Delivery 22
 - 4.1.2 Delivery w/o ref. 80016309 Change: Overview 22
 - 4.2 How do I create a transfer order for picking (warehouse management)? 24
 - 4.2.1 Change Outbound Delivery 24

 The headings will be automatically inserted at the appropriate level, depending on the position from where the export is carried out. The Producer document doesn't require any modification in relation to the heading levels.

