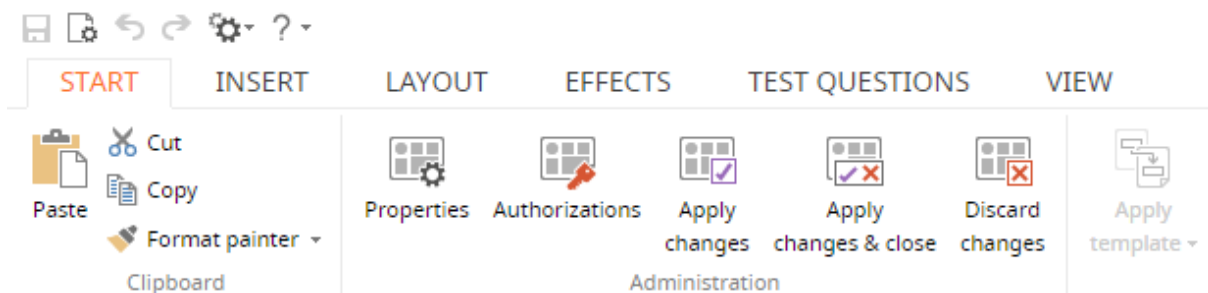# Template authorizations

This documentation will reveal all the factors that need to be considered when assigning template authorizations.
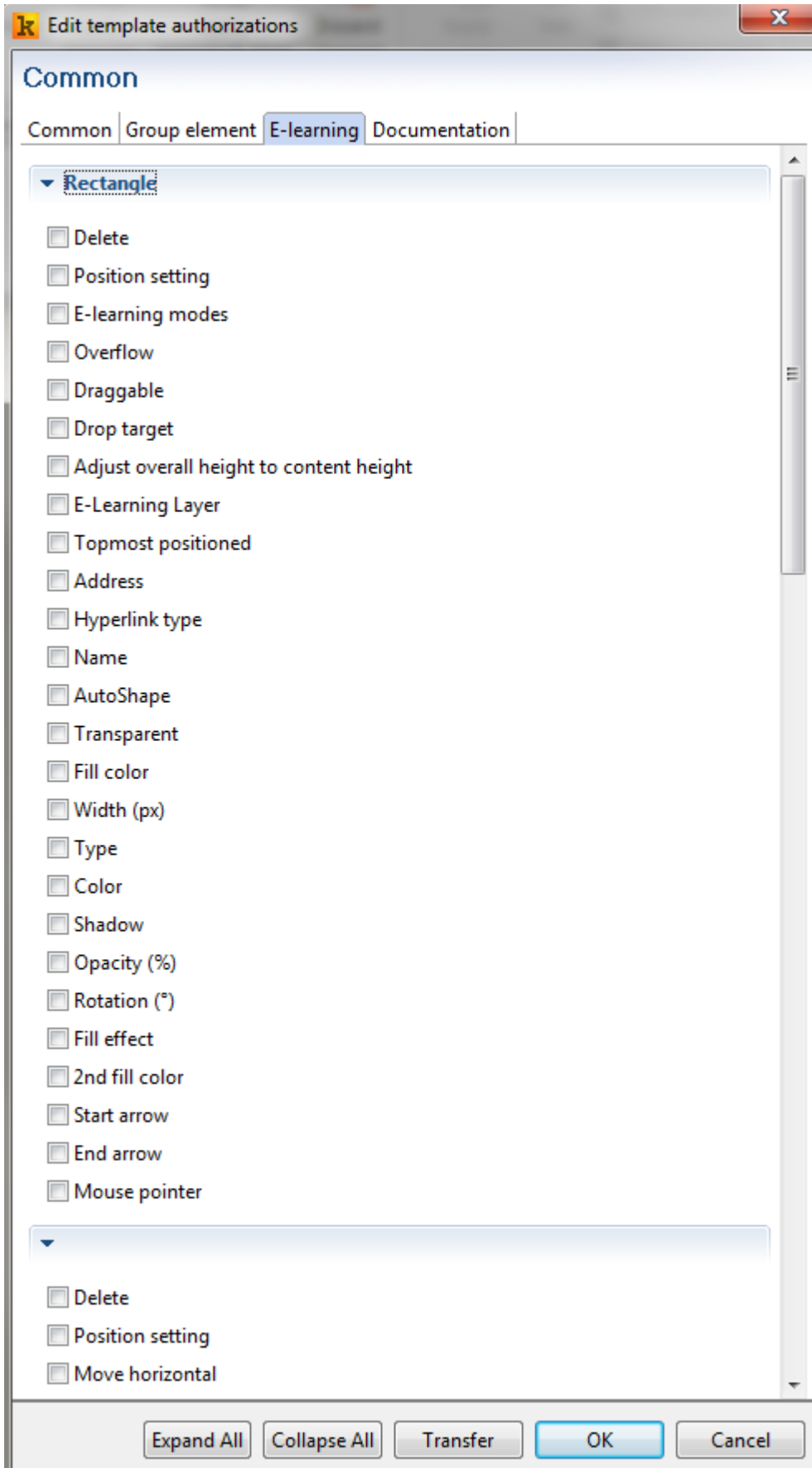
1   Introduction

The whole issue of template authorizations is of central importance when it comes to the definition and distribution of templates within a customer configuration. Many subsequent problems involving the improper use of functions and concepts can be traced back to template authorizations.

Whether dealing with a step or object template, one thing is certain: the decision regarding which properties of the objects in the template can be changed by authors – and which cannot – should not be taken lightly and requires careful consideration. As soon as a template with inappropriate authorizations has been published, rectifying the resulting negative consequences involves a huge amount of work and effort. You therefore need to consider all the following issues when creating templates, and seek out the support of our consultants should you have any doubts about how to proceed.

At first glance, the whole issue of template authorizations appears quite straightforward: Every element in the template has a set of different properties. In the case of AutoShapes (for example), these involve the border and fill colors, display options etc. Each of these properties can be set via the *Authorizations* button in the Template Editor in such a way that allows an author to change or overwrite the preset values in the template.

But this involves far-reaching consequences: If a template designer wants to ensure consistency, they would specify that as many of these properties as possible cannot be changed. This means that authors are forced to use the templates just as they are. The designer merely has to ensure that the properties that the author should be allowed to change (such as inputting text into textboxes) have been released in the authorizations. This is done by selecting the checkbox next to the desired property:

Edit template authorizations

Common

Common | Group element | **E-learning** | Documentation

▼ **Rectangle**

☐ Delete
☐ Position setting
☐ E-learning modes
☐ Overflow
☐ Draggable
☐ Drop target
☐ Adjust overall height to content height
☐ E-Learning Layer
☐ Topmost positioned
☐ Address
☐ Hyperlink type
☐ Name
☐ AutoShape
☐ Transparent
☐ Fill color
☐ Width (px)
☐ Type
☐ Color
☐ Shadow
☐ Opacity (%)
☐ Rotation (°)
☐ Fill effect
☐ 2nd fill color
☐ Start arrow
☐ End arrow
☐ Mouse pointer

▼

☐ Delete
☐ Position setting
☐ Move horizontal

Expand All | Collapse All | Transfer | OK | Cancel

However, if too many properties are released, the whole concept of a template is rendered meaningless. A compromise, which should take account of the project requirements and expertise of the various authors, therefore has to be found.

However, it needs to be remembered that the removal of former authorizations has far-reaching consequences for existing content. Let's assume that an author has the authorization to change the border color of an AutoShape. It's orange in the template and the author subsequently changes it to bright blue. If this authorization is then removed, the configuration (including the template) updated and the document subsequently opened by the author, the border color will then be reset to the default value specified by the template, i.e. it will be orange again. This may not seem particularly worrying, but what if it was the authorization to change text that was removed? If this were to happen, all text would revert to standard text, meaning that all the authors' work and effort in the meantime would be deleted without exception!

Another tip: If you protect certain elements in your template, the respective properties will no longer be listed in the authorization dialog. But it can still happen that some authorizations have been granted. You would then need to cancel the protection in order to check this.

2   General remarks

In light of the above observations, it's possible to identify some Best Practices and give some general advice:

- Award as few authorizations as possible when creating a new template. If necessary, you can subsequently add other authorizations.
- Be extremely careful when removing authorizations from existing templates.
- Changes to template properties will only be updated in those templates where the respective properties **cannot** be changed by authors.
- Protected template elements do not appear in the authorizations.
- If you use object bindings, they will take precedence over the authorizations to change object positions.
- If templates are deleted, the authorizations that were previously granted will also no longer apply in the template in the Producer document.
- The authorizations included in a template are inherited upward if this template is also used in a different template.