tts digital adoption solutions

Working with documents

Webinar session on tts performance suite

Agenda

tts **digital adoption solutions**

Creating documents

Learning objects and supported file types

Producer documents

> E-Learning

Step-by-step Guide

Documentation

Learning object

Creator content

Other uploaded files

(e.g. Excel or zip file)

Hyperlinks

(e.g. SharePoint or Intranet links)
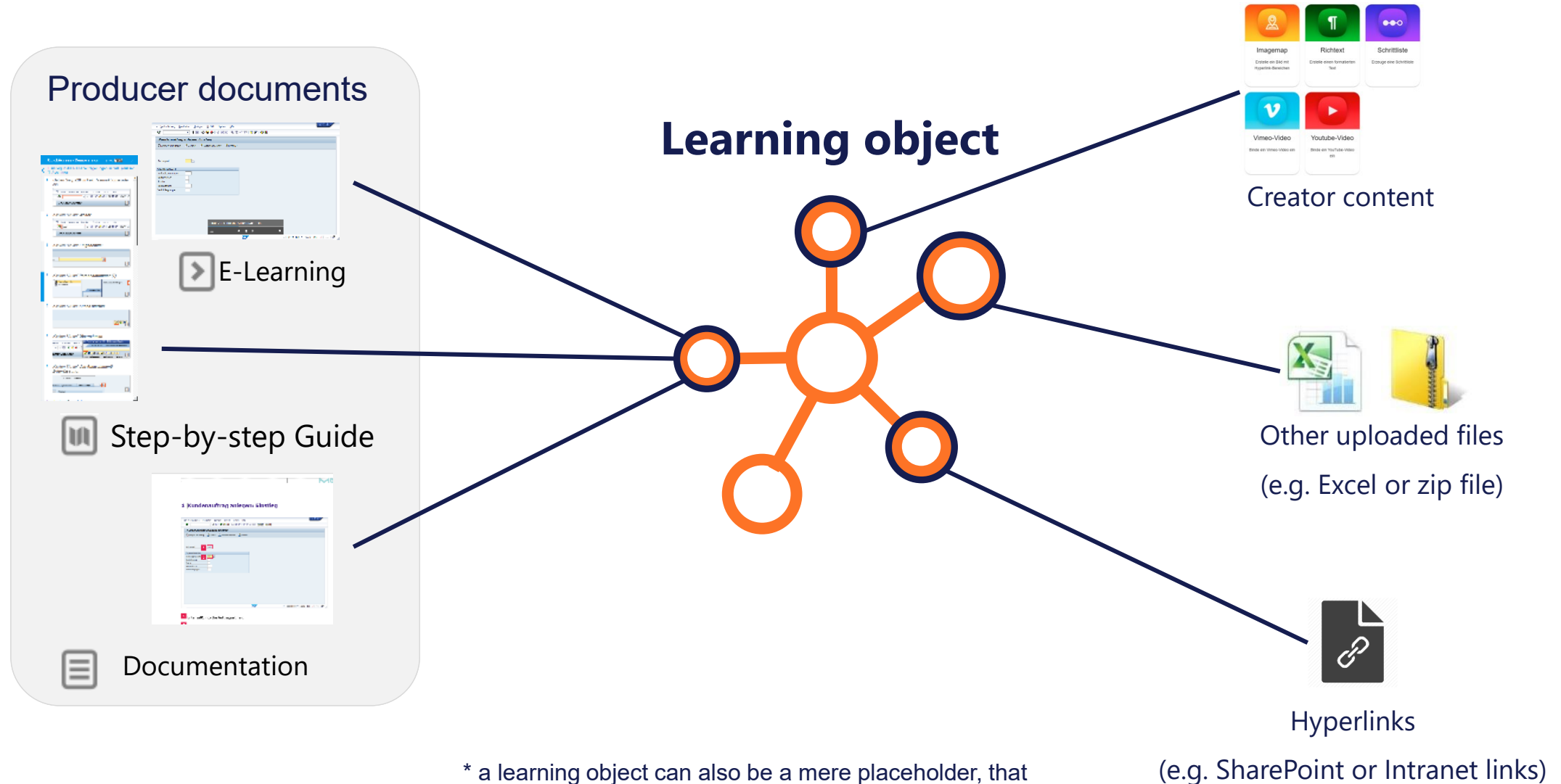
* a learning object can also be a mere placeholder, that is, a shell with meta data but no content. Placeholders are commonly used during planning stages.

A closer look at file types

Placeholder document

a shell with NO content attached – used for blueprinting

Third-party document

e. g. PDF, Office files, videos, images, …

Content type „Link"

Needs a document type of its own. You may also use it „creatively" – not just for URLs, but other purposes (e. g. „mailto:")

Creator content

Depends on the template used.
The most common formats include:
Step list,
image map,
rich text,
Youtube or
Vimeo videos

Producer document

Can be created from scratch, but also evolve from a placeholder

With export formats:

DEMO – Creating documents

Checking out / checking in documents

Checking out („Edit content") a document will lock it

Only the author who has checked out the document, or an administrator, can unlock the document.
This keeps other authors from editing the same content simultaneously, which might result in version conflicts.

Checked-out documents can easily be spotted as their date appears in red print. If the date is written in green, the document is available on the Curator.

| State | Checked out Fri, 16 October 2020, 1:33 PM |

**DEMO – searching for documents, working with variants and versions**

- provides access to all documents stored on the Curator, even those that are not used in any structured view (topics, courses, processes)

- allows you to delete documents for good (permissions required)

- provides additional information on all properties of each and every document, including its creation process, variants, versions, etc.

- lets you perform batch processing (search & replace, republish, etc.)

Tip: There is a shortcut available to display a document stored in a structured view directly in the documents view:
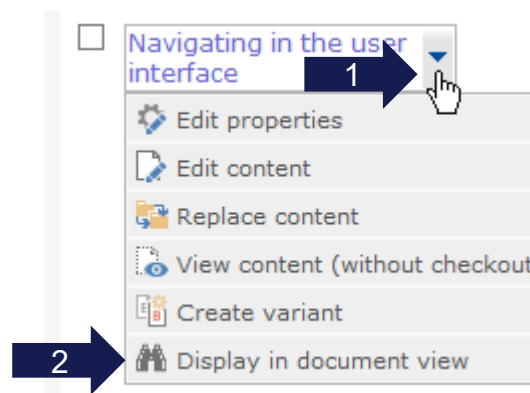
Workflow & Publishing

Workflow

- The Curator supports an unlimited number of workflows
  (via tts performance suite administration)
- Each document type can be subject to its own workflow
- The workflow controls „who can do what with a document, and when"
- A well-designed workflow helps distributing workload among authors (e. g. automatic filters for documents
  that have reached a QA state so members of the QA team find those documents in their group inbox)
- Changes to a document's workflow state are invoked by calling a „workflow-action"
- There is a clearly defined initial state for every document, plus at least one state where the document is
  available to end users

… see the following sample matrix for a four-state workflow

Default workflow matrix (example)

Source status \ Target status	Work in progress	In QA	Released	Archived
Work in progress		Send to QA	(release directly)	…
In QA	rework		release	…
Released	update	…		archive
Archived	revive	…	…	

**A few more hints for working with documents**

Tips and tricks for documents

- Third-party documents can be overwritten directly without having been checked out.
  Use the „Replace content" function for that.

- Do avoid the „View without checkout" and the „Undo checkout" functions unless you know what you're doing.

- The document properties can be customized and complemented by tts performance suite administrators.

- On the „Tools" tab, tts performance suite provides a wealth of report options, allowing you to generate Excel files or search result trees that contain e. g. all unused documents.
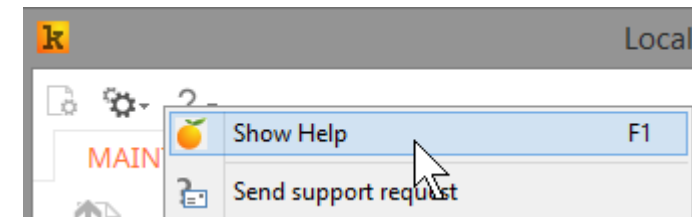
Closing thoughts

Where do I find more information

Logging in and creating documents
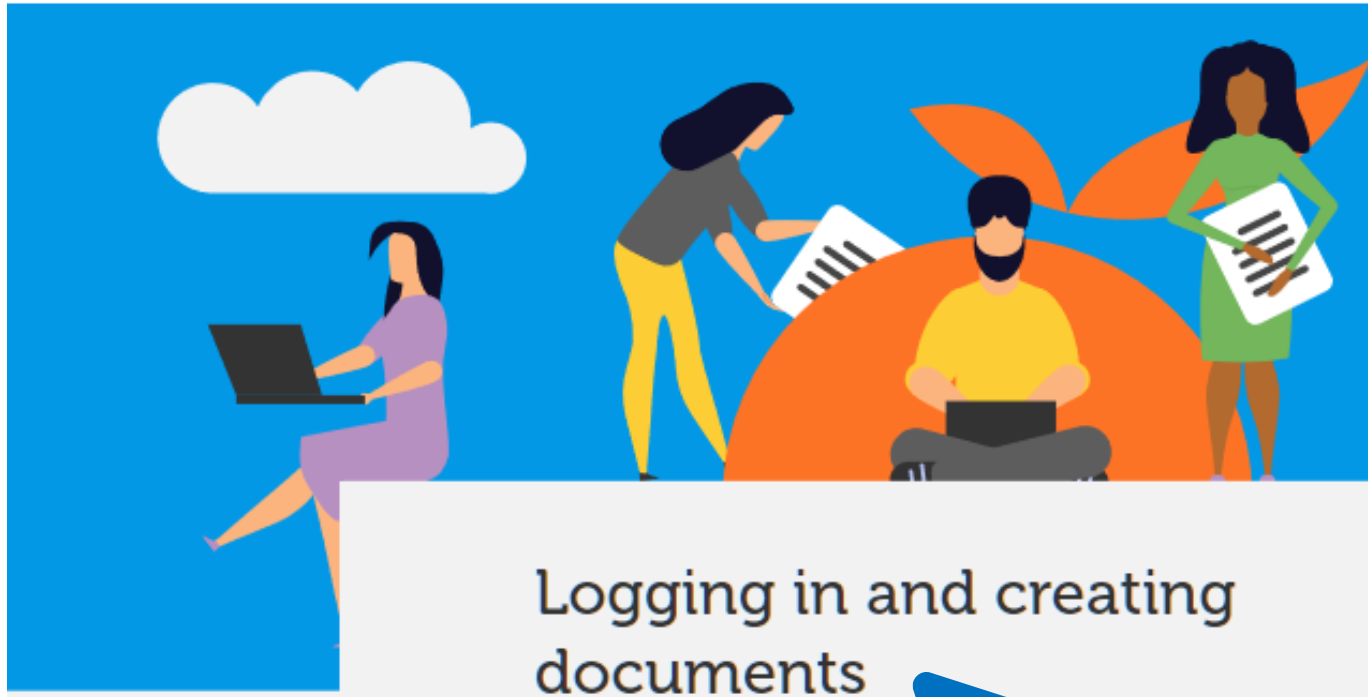
QuickAccess inside tts performance suite (F1)

Online help portal

Online Help

Facing technical problems?

support@tt-s.com