

# Working with documents

Open Training Session  
on tts performance suite





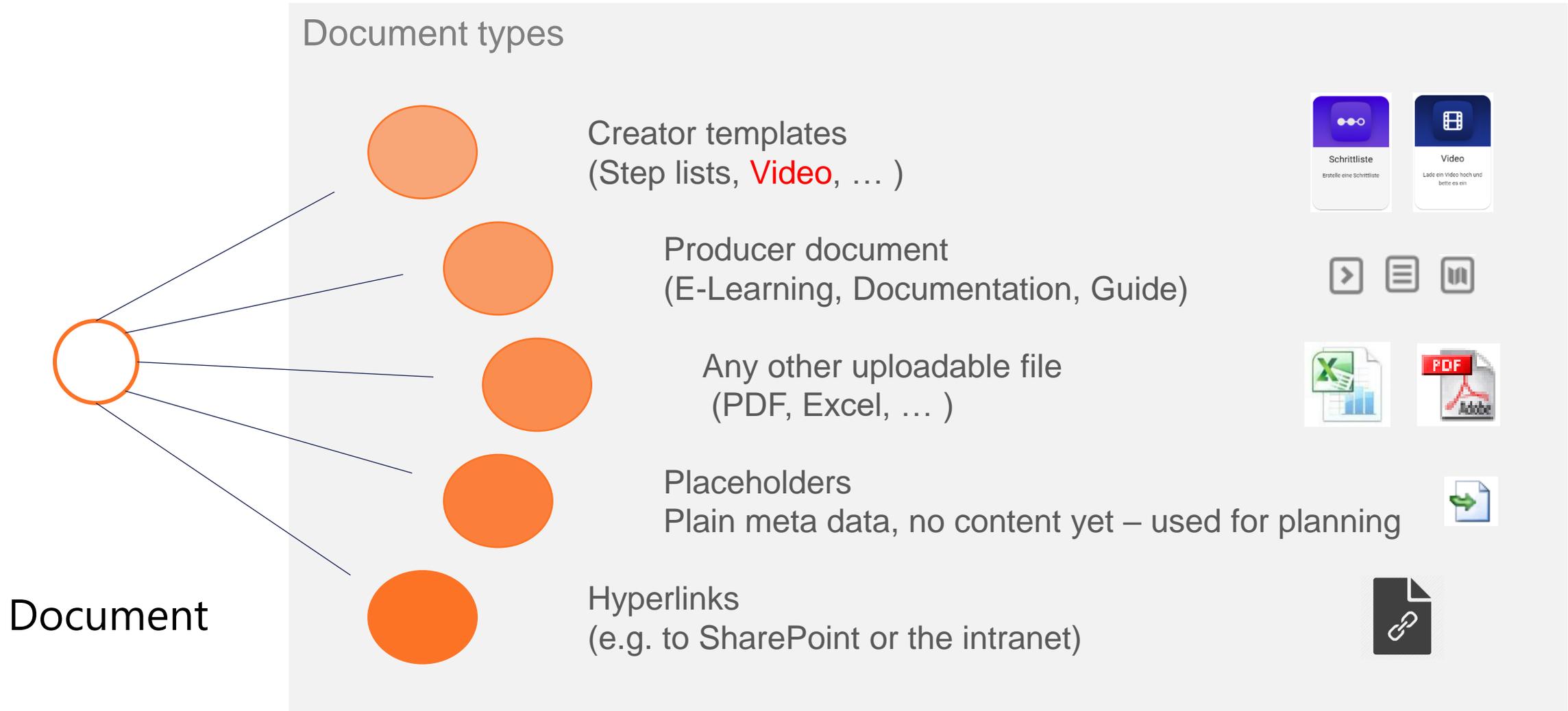
## Agenda

- 1 Creating documents**
- 2 Checking out / checking in documents**
- 3 Workflow and publishing**
- 4 The Work Pool**
- 5 Outlook**

# Creating documents



# The document principle



A closer look at file types

Creator content	Producer document	Third-party document	Placeholder document	Content type "link"
<p>Document-based templates (*), like step lists, videos, ...</p> <p>The possibilities depend on the template used.</p>	<p>Can only be edited with the Producer client installed.</p>  <p>Export formats look like this (see below):</p>	<p>e.g. PDF, Office files, ZIP...</p>	<p>Does NOT YET contain content, is used to structure content that is yet to be created.</p>	<p>Based on its own document type that must exist.</p> <p>My also be used "creatively" (e. g. „mailto:“).</p>
<div style="display: flex; justify-content: space-around;"> <div data-bbox="150 936 303 1165">  <p>Steplist Create a steplist</p> </div> <div data-bbox="351 936 504 1165">  <p>Video Upload and embed a video</p> </div> </div>				

(\* ) There are also Creator templates that can be used as embedded content in processes or topics (cf. the Open Training on *Business Guidance*).



# 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 Wed, 15 January 2025, 2:22 PM

# DEMO

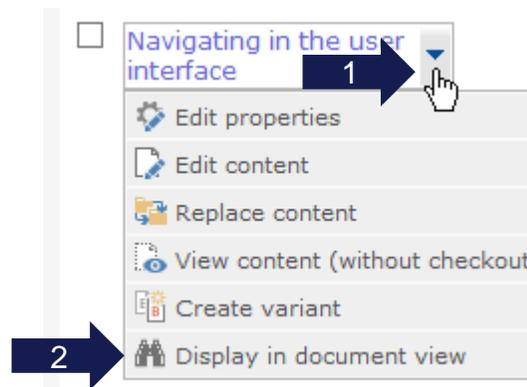
Searching for documents,  
working with variants and versions



## The document view...

- 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.)

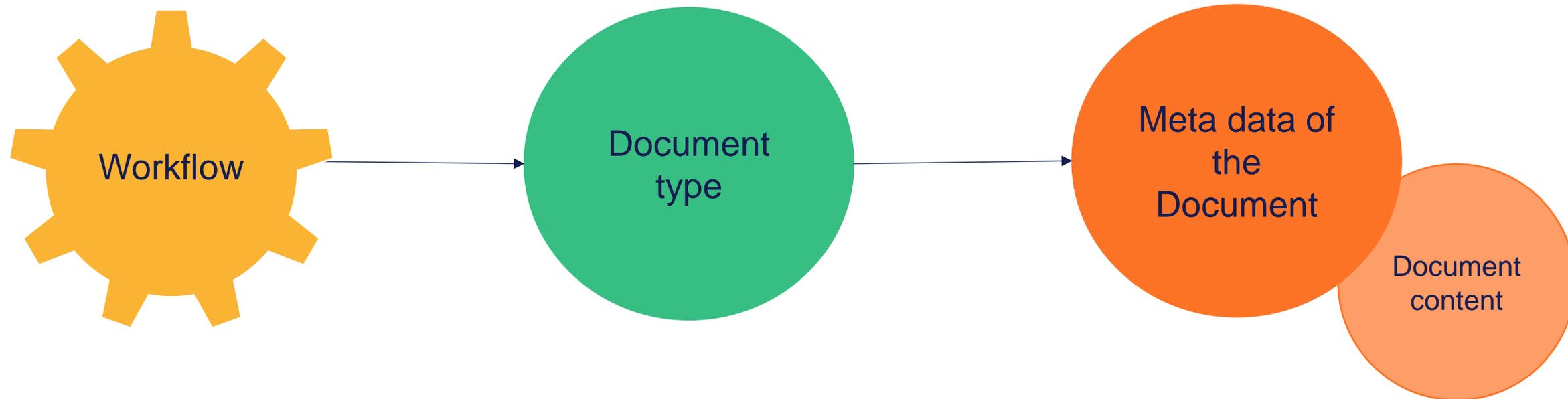
*Tip: There is a shortcut available to display a document you encounter in a structured view directly in the document view:*



# Workflow & Publishing



## Meta data, Document types and Workflow

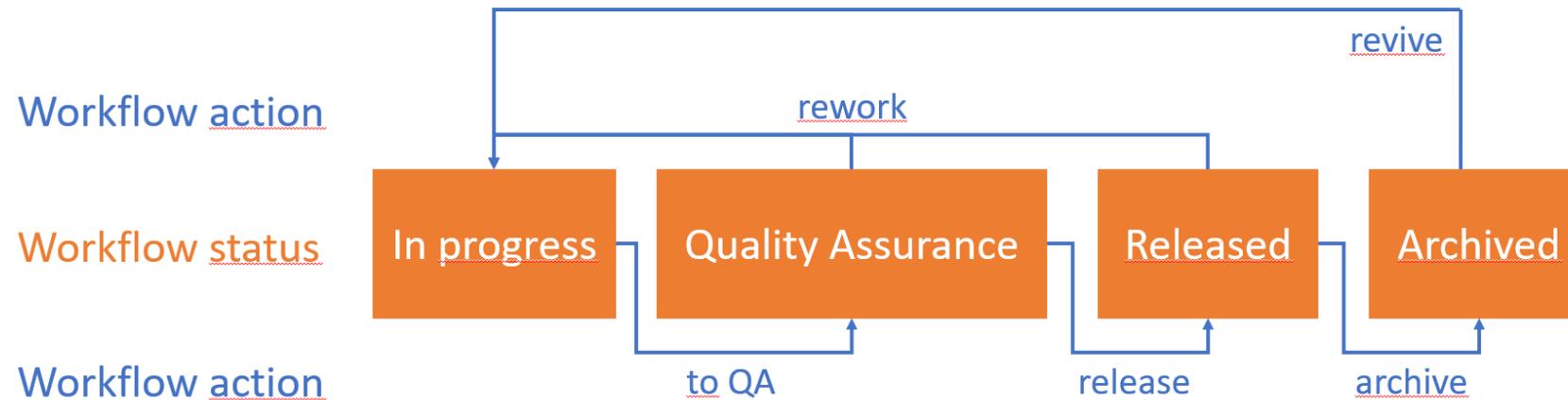


The workflow controls “who can do what with a document, and when“

Document types serve as containers for documents. Each of them is subject to exactly one workflow.

The document type defines which metadata are available in addition to the basic metadata.

# Workflow



- There is a defined initial status for documents and at least one status in which the document is visible to employees (released).
- Changes to the workflow status of a document are triggered by workflow actions.
- If documents are revised, the last document version with the status Released remains visible to end users.
- If documents are archived, the released version is withdrawn and the document is no longer visible to the employees.

# The Work Pool

# The workflow-based Work Pool

- **My inbox**

Your own inbox is fed dynamically from documents for which you have been entered as responsible as a logged-in user. You must also have editing rights for these documents.

- **Group inbox**

All documents that have a workflow status in which you have editing rights as a logged-in user are displayed in the group inbox. Documents for which another user has been explicitly specified as responsible are not displayed.

- **Checked-out documents**

All documents that you have checked out as a logged-in user and have not yet returned are listed here.

- **My documents**

This list contains all documents for which you are registered as the owner. These are usually all the documents you have created.



# A few more hints...

... for working with documents

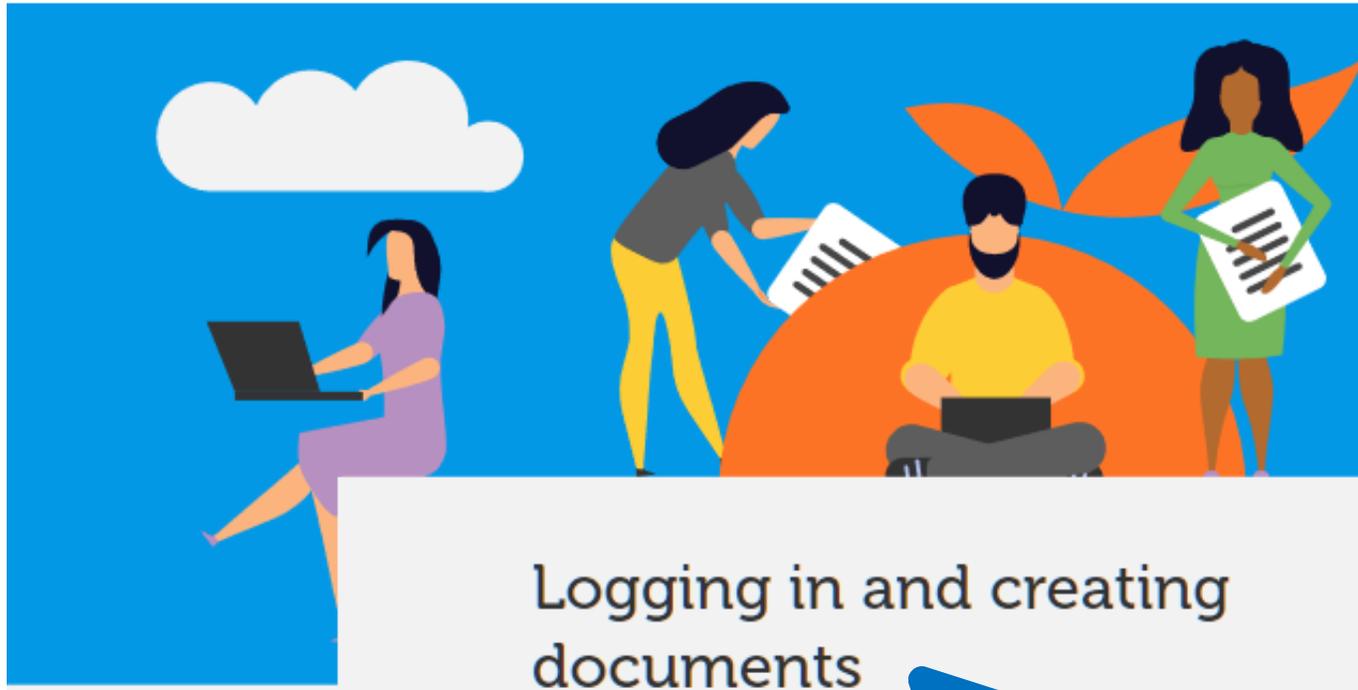
## Tips and tricks for documents

- 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

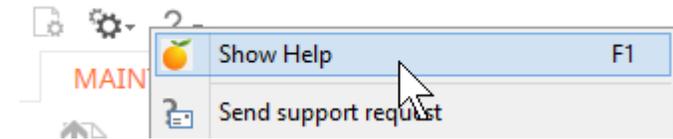


Logging in and creating documents



## ... and help?

F1 help



Online help portal

[Knowledge Base](#)

Facing technical problems?

[support@tt-s.com](mailto:support@tt-s.com)