Author roles: Documentation

This documentation shows you the management options for author roles on the Documentation tab.

The first section of the Documentation tab allows you to specify which rights a user with this author role is to have in relation to saved documents. These authorizations are assigned via the document types.

🖉 If you want to select/deselect the checkboxes for a whole row, you just have to double-click one of the checkboxes. This copies the corresponding action to all the other checkboxes in the respective group. In the case of columns, clicking the green checkmarks at the top of the column is all it takes to award/remove all rights for the respective column.

🖉 Please note that you can't set all options due to the fact that the restricted options ("Delete, own Documents only") and the full set of options ("Delete") are mutually exclusive.

Detailed list of authorizations:

- View: This role only allows the user to display the respective document type. Changes and deletions are not possible.
- Add: New documents of this type can be created.
- Edit: This role can be used to access and edit documents of the respective document type. However, this does not involve the deletion of such documents.
- Delete: Documents of this particular document type can be deleted.

- Create variant: This role can be used to create variants of documents with the corresponding document type.
- Assign owner: This role can be used to change the owner of a document.
- Republish documents: This role can be used to republish documents of a particular document type.

1 Document Editor view

The options in the "Document Editor view" section can be used to restrict the role perspective in the Document Editor to "E-Learning", "Documentation" or "Guide", or to a combination of these three views. Please note that the "Guide" setting only impacts on the Document Editor.

- **E-Learning:** The user can access the E-Learning view in the Document Editor.
- **Documentation:** The user can access the Documentation view in the Document Editor.
- **Guide:** The user can access the Guide view in the Document Editor.

2 Knowledge creation

- **Record applications:** This component supports the recording of all types of IT applications (e.g. SAP, Microsoft, Web applications etc.).
- **Insert textboxes and work on presentation objects:** Allows users to add presentation objects, including text fields. Please note that the right to edit text can be awarded separately (see below).
- **Edit text:** Supports the editing of existing text (textboxes or standard text).
- **Insert AutoTexts:** Supports the insertion of dynamic AutoTexts.
- **Insert and edit hyperlinks:** Supports the creation and maintenance of hyperlinks.
- **Fill in default templates:** Supports the use of templates that were created with the Template Editor.
- **Transfer templates and further template functions:** Allows users to use templates (e.g. to transform a text field into a template text field) and additional template functions, e.g. access to information in a template.

3 Knowledge creation (enhancements)

- **Insert tables and images:** Enhanced editing functions for documentation and e-learning. The enhanced functions refer to the insertion of tables or images, along with their editing functions.
- **Classify steps:** Allows users to insert outline elements.
- **Insert PowerPoint:** Supports the insertion of existing PowerPoint slides into a Producer document.
- **Edit QuickAccess signature:** Editing functions for QA signatures.
- **Insert SmartComponents:** Supports the insertion of SmartComponents into the e-learning.

4 Knowledge review

- **Create test questions:** A prerequisite for the creation of test questions.
- **Create assessment:** A prerequisite for the creation of assessments.
- **Generate profiling:** A prerequisite for the use of profiling-related functions in tests.

5 E-learning refinement

- **Insert steps:** Allows the insertion of steps into a Producer document.
- **Edit comments and feedbacks:** Allows the editing of comments and feedbacks (normally displayed in the Comment window on the tutorial control element).
- **Display lists involving presentation objects and texts:** Allows authors to list all the presentation objects and texts (via the "View tab")
- **Change object sequence:** Allows authors to change the order of objects in the various lists, thereby altering their appearance.
- **Insert AutoShapes:** Allows authors to add AutoShapes (e.g. rectangles or circles) to an e-learning.
- **Work with object links:** Allows authors to insert and edit objects that merely represent links to existing objects.
- **Insert interactions:** Allows authors to insert interactions into any presentation object.
- **Arrange, bind and group objects:** Includes a range of functions with which the layout of presentation objects can be optimized via the Arrange, Group and Bind function groups.
- **Add effects:** Grants access to the Effect function.
- **Manage additional paths:** Grants access to the function for parallel paths.

6 Multimedia

- **Add films:** Allows authors to add video files to an e-learning.
- **Generate speaker texts:** Allows authors to create speaker texts from almost every type of text in the document.
- **Add sound:** Allows authors to integrate audio files into an e-learning.

7 Templates

- **Lay out global templates:** Supports the design of page templates with a fixed layout and predefined placeholders, along with the design of object templates. This includes global templates that can be used by all users.
- **Lay out your own templates:** Supports the design of page templates with a fixed layout and predefined placeholders, along with the design of object templates. This includes own templates that can only be used by this particular user.

8 Updating and document variants

- **Update recordings (ReRecording):** Supports the repeat recording of recorded sequences for updating purposes, including the option to specify different input data.
- **Form variants:** Allows users to create a variant of an existing document by changing at least one of the so-called "variant-forming" properties. Please note that this authorization also depends on the setting for the document type.
- **Export and import texts**: Supports the exchange of text with translation management systems based on XLIFF / WordML.

9 Work support

- **Generate tasks**: Supports the creation of tasks as an indication of what work still has to be done.
- **Export and import - as well as send - TTCP (from local workspace):** Allows users to use the TTCP export format for the saving and sending of Producer documents.
- **Duplicate documents (in the local workspace):** Allows users to duplicate a document that has been saved in the local workspace.

10 Exports

- **Export documents (from local workspace):** Allows authors to create an e-learning or documentation export from files that have been stored locally.
- **Export WBT:** This component generates Web-Based Training, including the interfaces to LMS systems.
- **Export manual:** A prerequisite for the creation of manuals.

11 Version management

- **Delete versions:** Allows authors to delete a version of a document.
- **Recreate versions:** Allows authors to restore a version of a document (to become the latest version).