



Creating and editing templates

This documentation will reveal how to create, edit and delete templates, while also explaining which elements templates can contain.

There are many aspects to consider when updating templates. This help topic covers the spectrum from the creation of templates and the editing of existing templates all the way up to the deletion of templates and the principles behind these procedures.

1 Creating templates

The configuration has to be checked out from the Curator in order to create global templates. This ensures that no other person can make changes to the configuration at the same time. Please note that the corresponding right has to be set in the author roles.

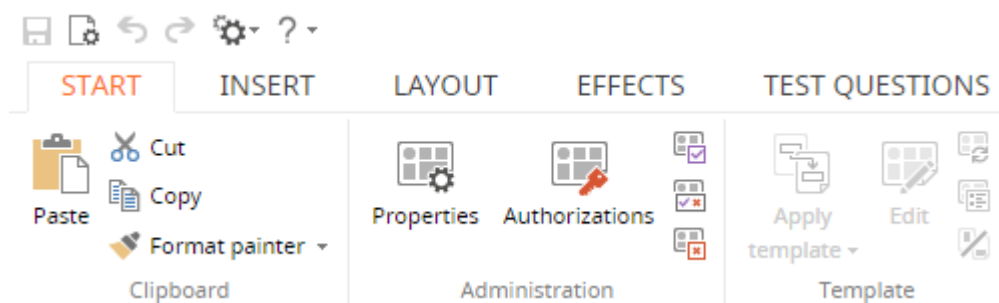
Once this has been done, any step or object can be designed directly in the regular Document Editor and the desired properties added. The "Create step template" or "Create object template" functions can be used to transfer these steps or objects to a step or object template. This template then immediately becomes part of the checked-out configuration and it can be changed via the "Edit template" function in either the Document Editor or Local Workspace.

You are advised to do this directly during the initial creation because experience has shown that new templates usually don't yet have the desired properties or authorizations.

2 Editing templates

The procedure is identical, no matter whether you want to create a brand-new template or edit an existing one. Once the template editing process begins, the template will immediately be displayed in the Local Workspace, in addition to all the other "regular" Producer documents located there.

The desired editing steps can then be performed in the Template Editor, in the same familiar way as when working in the Document Editor. You also need to consider the additional template property and template authorization options. These settings can be accessed via these buttons in the Template Editor:



The following settings can be introduced under *Properties*:

- **Title:** The name of the template can be maintained here. It's possible to display the title localized into all the interface languages supported by tts performance suite by using a special syntax. Example: "Title page||de-de=Titelseite||es-es=pagina del titulo||fr-fr=titre de page" ensures that the template title will be shown in English, German, Spanish and French.
- **Category:** This setting specifies the submenu in which the corresponding template will be listed for selection. Depending on the type of template, the new template will be displayed when inserting a step or object template. The author is not able to extend the selection of categories. However, an extension via customizing is possible.
- **Visible in the Document Editor in category:** This setting allows the template to be hidden from authors. This setting is useful if you're using nested templates but don't want to make all the associated templates individually available.
- **Width/Height:** These settings define the size of the step or object template.
- **Page template:** Defines whether the template is a step template or not.
- **Automatic update when template changes:** When selected, this option ensures that all changes made to the template are automatically updated in Producer documents as soon as they are edited.
- **Update requires confirmation:** When selected, this option ensures that authors are required to confirm an update of the template whenever they encounter it in the Document Editor (assuming the template has been changed).
- **Show test question wizard after inserting template** (only in the case of step templates): This option is only relevant to test question templates. When set, this option ensures that the wizard for filling in AutoTexts is automatically opened whenever an author inserts this template.

Properties

Edit object template

Properties
Group element

Title:

Configuration:

Description:

Author:

Storage:

Category:

Visible in the Document Editor in category

Width (px):

Height (px):

Page template

Version:

Automatic update when template changes

Update requires confirmation

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When dealing with a step template, it's possible to also define the specific step properties that are to be filled by default when inserting the template. This involves the step properties with which you are already familiar in the Document Editor.

The "Group element" tab is the equivalent of "Step properties" when dealing with object templates. This is where the default properties of the group element are defined. The group element is normally a kind of container element that holds all elements of the object template and which defines all the properties of the template (see next section).

To find out more about the whole issue of *authorizations*, please refer to a separate help document.

Once all modifications to the template have been introduced, you not only have to save the changes but also transfer the template to the configuration (which is still checked out), thereby ensuring that the template is also updated in the configuration. This can be done via the "Apply changes" button. When editing templates, it's a good idea to have an entity of the template open simultaneously in a Document Editor window in order to directly check the impact of each and every change during editing.



In the event that you want to undo all changes, you should select the "Discard changes" function. The "Apply changes & close" button not only transfers the modifications to the configuration, but also closes the Template Editor and removes the template from the Local Workspace – all this in one go.

3 Group elements in object templates

While the actual step defines the frame in the case of step templates, the concept for object templates is designed differently. As soon as an object template consisting of several objects is created, a superordinate container object is positioned over all the constituent objects – a so-called *group element*. This group element specifies the size of the resulting object template and all its associated objects. This is similar to the grouping concept used in the Document Editor to group several objects together.

The "Group element" tab in the properties of the object template can be used to specify the exact position where the template is to be inserted in the Document Editor, along with defining the other properties that the group of objects is to have within the template.

Group element

Edit object template

Properties
Group element

X (px):

Y (px):

E-learning modes: Study and Assessment mode ▼

Overflow: Visible ▼

Draggable

Drop target

Adjust overall height to content height

E-Learning Layer: ▼

Topmost positioned

Address:

Hyperlink type: External link ▼

Mouse pointer: ▼

OK
Cancel

4 Binding

The use of *object binding* is a powerful tool, particularly when it comes to the creation and editing of step templates. Binding makes it possible to specify the relative orientation of objects in step templates to the page margins. This method facilitates the creation of step templates that dynamically adapt to the resolution set by authors.

But the use of binding can sometimes also be very beneficial in object templates. Binding can be really useful, particularly in cases where an object template consisting of several elements is created and the author wants to change its width (for example). The binding function also has to be used to ensure that the objects within this template maintain their relative orientation or can be dragged to make wider. In this case, you need to bind the objects to the group element.

A little tip: Whenever a new object template is initially designed in the Document Editor, you should try to refrain from using bindings in the first step. This is due to the fact that no group

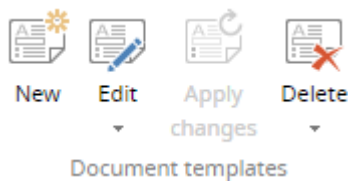
element yet exists, meaning that you'll be unable to define the relative object positions. This will only be created after transfer to an object template. Only then does it make sense to define the binding settings.

If, for example, you have already positioned a group around the desired objects in the hope of using it to define the binding before the creation of the object template, the subsequent object template will include an unwanted intermediate level. This not only unnecessarily increases the complexity of the template, but also results in extra maintenance work in the Template Editor.

5 Deleting templates

As you can well imagine, the deletion of templates is a procedure which requires extreme caution. After all, this can have huge consequences for existing content in which the particular templates are used.

The deletion of templates can only be done in the Local Workspace. Templates can be selected and deleted via the "Delete" menu in the "Document templates" function group on the "Templates" tab. Please note that the configuration also has to be checked out for this to work:



But what happens to existing content as soon as a template used within it is deleted?

The first thing you need to remember is that the impact of template changes or the deletion of templates only becomes apparent when the document is opened in the Document Editor or when the document is republished in the Curator. Content will not be changed until one of these events takes place.

But you will be relieved to hear that existing content is not deleted when such a document is opened, not even in cases involving a deleted template. The list of presentation objects will then indicate that the template can no longer be found.

However, it is then no longer possible to make additional changes to the content of the template. This means that no text entries can be changed and no colors etc. modified. This is due to a security mechanism aimed at preventing the loss of data and which is based on the special authorization settings in the original template. In the event that changes are desired, the reference to the template has to be removed via the "Unlink template" function. The template is then transferred to a group, all of whose elements can then be changed.

You therefore need to think of all the consequences should you ever consider deleting a particular template. Alternatively, you also have the tried-and-tested option of making a template that is no longer required immediately unavailable to authors by deactivating the "Visible in the Document Editor in category" template property. This method ensures that



the template can no longer be used, but that in cases where the template is already in use, it will still be possible to use the options that were originally intended.