

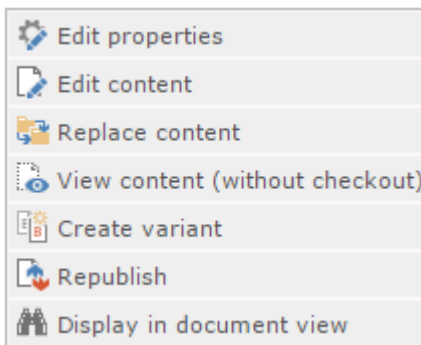
Functions around a document

This documentation explains the functions around a document, such as editing content, replacing content, viewing content (without checkout), deleting.

You can check out documents from the server for editing and then check them in again. It's also possible to replace the content of a document or remove it from the Curator.

1 Checking out documents

Once a document has been uploaded, it can then be found in the Curator. Whenever you want to edit the content of a document, you first need to check it out. To do so, simply click the title in the **Curator** or open the document's dropdown menu and select the **Edit content** option.




It can then be found in your work pool under **checked-out documents** and displayed in your local workspace. Due to the red highlighting of the document's check-out time, it looks different to the other files in the Curator view.





You can access your local workspace via the little button in the top right-hand corner above the menu ribbon.



 Please note that the procedure varies when dealing with **non-Producer documents** (e.g. Word or Excel files): These files can also be checked out for editing via a 'Save file as' dialog. The corresponding document is then marked as checked out until it has been checked back in correctly.

The document is blocked for other authors while being edited. This is indicated by a corresponding message in the document properties.

2 Checking in documents


Once you have finished editing a document, you can then return it to the Curator area. To do so, use this button . This button can also be found on the **Maintenance** tab in the **Local workspace**. If you have checked out several documents for editing, you can select them all together and check them back in simultaneously. It's possible to continue working with tts performance suite while documents are being transferred to/from the server. To do so, simply click **Run in Background** in the status window. When in the local workspace, you can also display an overview of all processes running in the background and their current **progress**. To do so, simply click this button .



3 Undoing the checkout or canceling editing

It's possible to undo the checkout in cases where you have already edited a document but want to undo the editing (perhaps because it was full of errors). Your current changes are then not saved and the document returns to the state it had prior to checkout.

Editing can only be undone by the author who checked out the document or an administrator. An administrator's cancellation right is envisaged for situations where an author blocked a document for a long time and cannot be reached because he/she is on vacation, for example.

In the Local workspace

Documents that you have checked out for editing can be recognized in the Local workspace of tts performance suite via their source information or this icon  which is displayed in front of the document's title. The button for discarding local changes (**Undo checkout**) is then active.

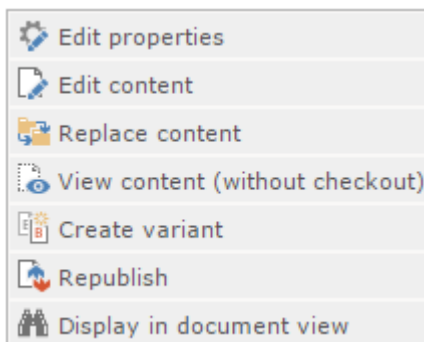
Document Management area		Local Workspace	Translation
L	Title		Last change
	 How do I create a customer order?		04.01.2017 14:11:28

Use the **Undo checkout** button here if you want to return a checked-out document without applying any changes that have been made.

To ensure that you don't inadvertently lose any edits you have currently made, a confirmation prompt appears in which you can either cancel the procedure or click **OK** to confirm your wish to undo.

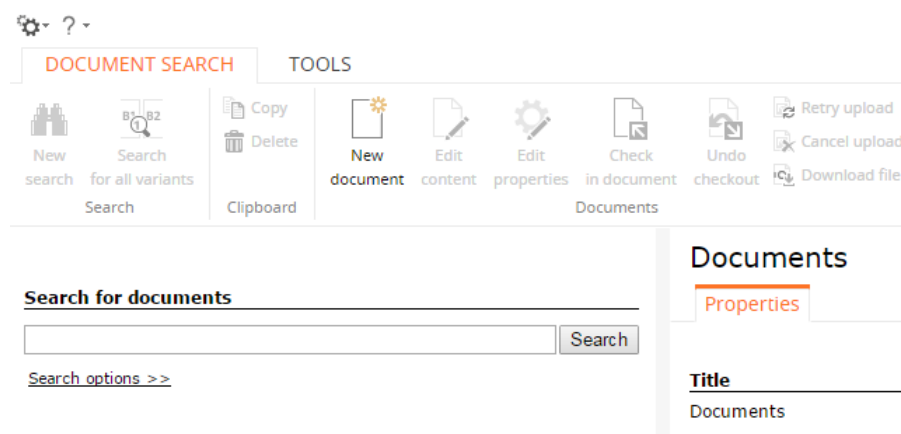
Via the dropdown menu in the Curator

The checking out of a document doesn't necessarily have to be undone in the local workspace, but can also be carried out via the dropdown menu in the **Curator**.



Via the menu ribbon in the Curator

The third method involves displaying the document in the **document search**.



Then access the **properties** on the right of the tab and select the **Undo checkout** button in the menu ribbon whenever you want to return the checked-out document without applying any changes that have been made.

A confirmation prompt reminds the user that all local changes made to the document will be lost as soon as the user confirms the undo action.

4 Viewing documents without checking them out

It's also possible to view the content of a document without giving the document the 'checked out' status on the server. To do so, simply click the **Download without checking out** button. The document is then opened in the Editor. But it is still marked as 'not checked out' in the Curator, and 'file system' appears as the source of the document in the local workspace. Once you have finished viewing the document in your local workspace, you can then easily remove it via the **Delete** button – without in any way impacting on the version stored on the server.

5 Replacing the content of a document

There are many situations in which it may be necessary to **replace** the content of a document. Such a scenario could occur when process flows have changed, meaning that the documentation therefore has to be updated. It's also possible to replace content via the document's dropdown menu in the **Curator**. When replacing the content of a document, a Wizard (similar to the one that helps with the creation of a new document) appears. Here you have the option of:

- creating a new Producer document,
- uploading an existing external file, or
- creating an empty placeholder.

Once you have selected the appropriate option, you should then continue by clicking the **Finish** button. Further editing can then be carried out in a manner similar to the editing of a Producer document.

6 Deleting a document

To delete a document from the server, start by carrying out a search for the document in question in the **Documents** view. Then insert a checkmark into the checkbox in front of the document's name. If your search found several documents, select all the documents you want to delete via the appropriate checkboxes before moving on to the next step. If a document is used in several contexts, a confirmation prompt will remind you that it will be deleted from all usage scenarios. A checkmark is also inserted by default next to the **Also delete document content on the file repository** option. The document will be permanently deleted upon confirming the prompt. This is the only way of actually removing the document.



It is impossible to recover a document once it has been deleted from the file repository.

If you use the **Remove** button on the **Assignment** tab in the **Curator** to delete the document, it will merely no longer be displayed there. But it will still exist in the file repository. If you use this method to remove a document, its link can be manually restored via the document search because the document still exists in the repository.