



User Help

Fabasoft Xtechwriter

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1 Introduction

Fabasoftware Xtechwriter enables the simple, intuitive and collaborative creation of structured documents in XML. You can create content in a media neutral manner, semantic markdown, automatically process and efficiently publish it.

2 Preparation

This chapter helps you with your first steps. You are provided an overview of the controls of the Fabasoftware Xtechwriter and the user management.

2.1 Initial registration

After purchasing the Fabasoftware Xtechwriter, the Fabasoftware Cloud Sales team sends you an e-mail with a registration link for the initial registration. Enter your registration data and log into the Fabasoftware Cloud.

Over the course of your first log-in, the welcome screen may display hints regarding certain data that needs to be completed.

Such data may be:

- entering a person that is to be contacted in case of privacy violations (privacy officer)
- entering important contact data of the organization
- defining of a compliance manager
- installing the Fabasoftware Cloud Client

Further information can be found in chapter 2.2.3 "Fabasoftware Cloud Client".

Click the link in the welcome screen to perform the corresponding action.

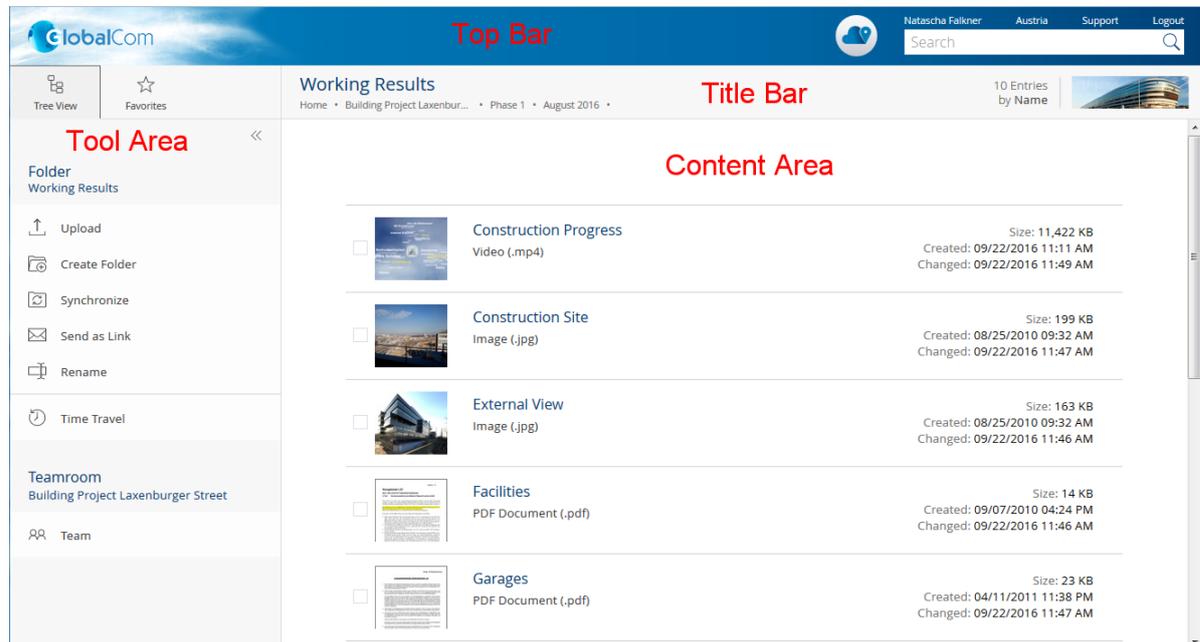
Note: The welcome screen is only displayed when there are notifications for you.

2.2 Fundamental Controls

The following chapters provide help for the operation of Fabasoftware Cloud Web Client

2.2.1 The Web Client

This chapter familiarizes you with the structure of the Fabasoft Cloud Web Client.



The web client is divided into the following areas:

- home (starting page)
- top bar
- tool area
- title bar
- menu bar (hidden by default)
- content area

Home

The dashboard concept of the home area allows you to show or hide widgets, change their size and move them.

Top Bar

In the top bar, your organization logo is displayed on the left and on the right, you can find the account menu (your user name), the data locations menu, the support button, the logout button, the quick access button, the home button and the search field.

Tool Area

The tool area is available in all widgets, but not directly on "Home".

The context-independent tools "Tree View" and "Favorites" can be opened and closed via a quick selection. The "Actions" are always displayed. Depending on the context, different actions are provided.

Up to three tool areas can be displayed next to each other (e.g. "Tree View", "Actions" and "Authorize Team"). The tree view can be resized to be able to read even longer entries conveniently.

Tree View

Here you can find your Teamroom and folder hierarchy in a tree view, which allows for fast navigation.

Favorites

You can add frequently used objects (e.g. Teamrooms or documents) to your favorites. To do so, navigate in the desired object. In the "Favorites" tool, the object is offered to be added.

Actions

In the "Actions" tool area, you find important actions that are relevant in the current context.

Title Bar

In the title bar, you will find the breadcrumbs of the currently opened hierarchy. If you navigate in a widget, all other widgets of the same level are displayed as tabs.

Content Area

In the content area, the content of the current object is displayed. This may be, for example, the contents of a folder or the preview of a document. The top level is referred to as "Home".

2.2.2 Performing Actions

The following basic options are available:

- Left-click the desired button to perform the corresponding action.
- The tool "Actions" contains the most important actions for the current context. The actions relate to the object displayed in the content area. If, for example, you are located in an Xtech document you can open and edit the document via the action "Edit".
- The context menu of an element can be opened via a right-click. Usually, the context menu offers actions that are also available in the tools as well as actions that are less frequently required.
 - Context menu of objects
Perform a right-click onto an object in the content area. The context menu of said objects is then opened.
 - Context menu in the title bar
Perform a right-click onto the title bar. The context menu of the object currently displayed in the content area is opened.
 - Background context menu
When located in a Teamroom or a folder, perform a right-click in an empty section of the content area. The context menu contains actions that are relevant to working with lists (for example creating an object in the list).
- In order to select entries in a list, click the checkboxes of the corresponding entries. This allows you to perform a content menu action for several objects, for example.

2.2.3 Fabasoft Cloud Client

Installing the native Fabasoft Cloud Client is strongly recommended for efficient work. The Fabasoft Cloud Client is available for Microsoft Windows, Apple macOS and Ubuntu.

You can start the installation process via the web browser status (account menu (your user name) > "Status" > "Web Browser Status"). If your organization's guidelines do not allow installing on your device, please seek help from your IT department.

Further information can be found in the white paper "Fabasoft Cloud Client".

2.3 Organizational Administration

In order to efficiently manage and use the Fabasoft Xtechwriter, at least three teams are necessary. These teams allow for role-based management of access rights.

- Xtechwriter Administrators
Members of this team are meant to edit the Xtechwriter configuration (in general: the managing editors). They should be given full control in shelves as well.
- Xtechwriter Users
Members of this team are meant to use Fabasoft Xtechwriter (in general: editorial staff)
- Xtechwriter Users (external)
Members of this team are meant to have access to the external areas assigned to them.

2.3.1 Creating Users

Initially, there is one member in a cloud organization (the owner). As a start, you should create at least three users (for the roles "App Administrator", "App User", and "App User (External)").

Note: In general, user data is imported. In a pilot phase, however, you may create the users manually.

To create a user, follow these steps:

1. Navigate into your organization via "Home" and then into the widget "Membership".
2. Click the "Add Members" action.
3. Into the *User (E-Mail Address)* field, enter the e-mail address of the user.
4. In the drop-down menu, click "Invite new user".
5. Enter the *First Name* and the *Surname*, then click "Create".
6. Repeat steps 3 to 5 in order to add several members simultaneously.
7. Click the "Add" button.
8. Assign the full access edition to the users and click "Assign".
9. Click "Invite" in order to confirm the membership via e-mail to each member.

The newly added members can initially register via the e-mail invitation.

2.3.2 Creating Teams

To create teams for the role-based management of access rights, follow these steps:

1. In your organization, navigate into the "Membership" widget and then into the "Teams" widget.
2. Click the "Create Team" action.
3. In the *Name* field, enter the value "Xtechwriter Administrators" and click "Create".
4. Navigate into the newly created team and click the "Add Team Members" action.

5. In the *User* field, select the desired members.
Note: In a pilot phase, only add the designated users. A list of all available members can be displayed by typing an asterisk (*) and the enter key. Then select the desired user by clicking on them.
6. Click the "Add" button.

Repeat the process to create the teams "Xtechwriter Users" and "Xtechwriter Users (External)".

2.3.3 Authorizing Teams

In order to give access rights to the teams in the Xtechwriter configuration, follow these steps:

1. Navigate into the Xtechwriter configuration by clicking the Xtechwriter dashboard on "Home", then click "Switch to Configuration".
2. Click the "Team" action.
3. Click the plus symbol next to the "App Administrator" role to open the search field.
4. Enter "Xtechwriter Administrators" and press the enter key to search for the previously created team.
5. In the drop-down menu, click the "Xtechwriter Administrators" team.
Note: If you accidentally authorize the wrong team, right-click said team to remove it by clicking "Remove".
6. Repeat the process for the roles "App User" and "App User (External)".
7. In the "Xtechwriter Administrator" role, remove automatically set organization owner ("Remove" context menu command) in order to guarantee consistently role-based authorization.

Authorized members find the dashboard "Fabasoft Xtechwriter" on "Home". If roles are assigned while the affected users are logged in, they need to reload the page (F5 key) in order to find the dashboard.

When the pilot phase has run out, you can create additional Xtechwriter user teams (if necessary) to authorize various users in shelves and external areas.

3 Getting Started With Fabasoft Xtechwriter

After the authorizations by the organization owner (see chapter 2.3.3 "Authorizing Teams"), the Xtechwriter administrators can do the initial setup. Further information is available in chapter 8 "Administrative Tasks".

If you are an Xtechwriter user, continue with the following chapter.

4 Structural Elements of the Fabasoft Xtechwriter

The main structural elements of the Fabasoft Xtechwriter are:

- Xtechwriter Dashboard
The dashboard is the central access to Fabasoft Xtechwriter. Once a user is authorized in the Xtechwriter configuration as an app user, a dashboard is created and displayed on "Home".
- Xtechwriter Configuration
In the Xtechwriter configuration, general settings can be defined that apply to all shelves. You

need to be an app administrator in order to edit the Xtechwriter configuration. Navigate into the Xtechwriter dashboard via “Home”, then click the “Switch to Configuration” action.

- Shelf
Shelves are based upon the Xtechwriter configuration and manage Xtech documents as well as access rights.
- External Area
External areas can be created for users who are not supposed to have access to an entire Xtech document.
- Stylesheet
Stylesheets define the XML schema and the notation of the media-neutral Xtech documents.
- Xtech Document
An Xtech document describes the structure of a document.
- Topic
An Xtech document consists of individual topics.
- Text Module
Text modules allow for the re-use of topics and paragraphs in various Xtech documents. Additionally, conditions regarding the visibility of a text module can be defined.
- Publication
Xtech documents can be published as PDF documents. The publishing process considers the master data as well as the conditions defined for topics and text modules.

5 Xtechwriter Dashboard

The dashboard is the central access to Fabasoft Xtechwriter. Once a user is authorized in the Xtechwriter configuration as an app user, a dashboard is created and displayed on “Home”. When the same user is removed as an app user, the dashboard also disappears.

Areas

The Xtechwriter dashboard is divided into the following areas:

- *Last Used Contents*
Displays your last used contents (e.g. Xtech documents and topics).
- *Xtech Documents*
Displays the Xtech documents that you have access to.
- *Publications*
Displays the publications that you have access to.
- *External Areas*
Displays the external areas that you have access to.
- *Shelves*
Displays the shelves that you have access to.

Note: The areas *Publications* and *External Areas* are only displayed when there is at least one entry.

Actions

You can perform the following actions:

- **Create Xtech Document**
You can create an Xtech document based upon a stylesheet.
- **Create External Area**
You can create an external area that belongs to a shelf or an Xtech document. External areas enable users to provide content when they do not have access to the actual Xtech document.
- **Create Shelf**
As an app administrator, you can create a shelf for the management of Xtech documents.
- **Switch to Configuration**
As an app administrator, you can switch to the Xtechwriter configuration in order to define settings.
- **Settings**
You can manage and edit general properties of the Xtechwriter dashboard (e.g. the logo or notification settings).

6 Creating Xtech Documents

An Xtech document describes the structure of a document and consists of individual topics. The referenced stylesheet defines the XML schema and the notation of the document.

6.1 Creating Xtech Documents

In order to create an Xtech document, follow these steps:

1. Navigate into your Xtechwriter dashboard.
2. Click the "Create Xtech Document" action.
3. Define the following metadata:
 - *Name*
Defines the name of the Xtech document.
 - *Shelf*
Defines the shelf that the Xtech document is assigned to.
 - *Stylesheet*
Defines the XML schema and the notation of the document.
 - *Category*
Defines the category of the document. For example, it can be used as the condition for the usage of topics and text modules.
 - *Author*
Defines the user who forwards publications for approval (is used as workflow participant in the default approval process).
 - *Reviewer*
Defines the user who approves the publication (is used as workflow participant in the default approval process).
4. Click "Continue".

6.2 Editing Xtech Documents

The contents of an Xtech document are primarily created and maintained within the Xeditor. The document structure can be defined on topic-level as well in the tree view. Notably, existing topics can be re-used and added to an Xtech document.

6.2.1 Using Xeditor

The Xeditor is used to write the contents of the document. One can either edit the entire Xtech document or merely individual topics.

In order to edit an Xtech document with the Xeditor, follow these steps:

1. Navigate into the desired Xtech document.
2. Click the "Edit" action.
3. Write the desired content.
Note: Further information on the usage of the Xeditor can be found in the next section.
4. Click "Save" (floppy disk symbol; keys: `Ctrl + S`) and close the Xeditor window.

Xeditor

The Xeditor offers the following possibilities.

Work Area

- The document is displayed in the content area according to the referenced stylesheet to be edited.
- On the right, in "Table of Contents", the topics of the document are displayed in a tree view. Alternatively, in "Attributes", the attributes of the currently selected element can be displayed. If necessary, attributes defined in the stylesheet can be added.

Tool Bar

- General
By default, the buttons "Save", "Copy", "Cut", "Undo", "Redo" and "Search/Replace" are visible.
- Start
Allows users to format elements and add new elements (e.g. topics).
- Table
Allows users to add and edit tables.
- Review
Allows users to add comments and activate/deactivate change tracking.
- View
Allows users to adjust the document view (e.g. tags or placeholders).
- Fabasoft Cloud
Allows users to insert text modules and fields.

Footer

- XML Path
Displays the path to the selected XML element. The drop-down menu of the path elements allows performing actions such as "Insert element" or "Delete".

- Notifications

Notifications regarding, for example, a corrupt XML structure can be display by clicking the bell symbol.

The available XML elements are defined by the XML schema of the referenced stylesheet. Currently, the XML schema "Xeditor Schema Lightweight DITA" is supported.

When you create a new document, start by creating a topic element that represents the document. You can subordinate further topic elements to this topic element which then represent the chapters of the document. A topic element generally contains a title element, a body element (which contains the paragraph elements) and – as may be necessary – further topic elements acting as sub-chapters.

Example

In order to create a document containing the chapters "1. Introduction", "2. Preparation", and "2.1 Operation", follow these steps:

1. Edit the Xtech document.
2. In the tool bar, click the "Topic" button.
Note: Alternatively, open the drop-down menu of the first topic element in the footer and click "Insert element" > "Topic".
3. Enter the value "Introduction" as the title. By pressing the enter key, a placeholder paragraph is inserted below. Hence, you can write the first paragraph of the chapter.
4. Open the drop-down menu of the first topic element in the footer and click "Insert element" > "Topic".
5. Enter the value "Preparation" as the title. By pressing the enter key, a placeholder paragraph is inserted below.
6. In the tool bar, click the "Topic" button.
Note: Alternatively, open the drop-down menu of the second topic element in the footer and click "Insert element" > "Topic". The second topic element of the currently selected XML path is the chapter "Preparation". The corresponding element is highlighted in gray in the editor. Thus, you can quickly determine if you are in the correct XML path.
7. Enter the value "Operation" as the title. By pressing the enter key, a placeholder paragraph is inserted below.

Note: Alternatively, you can perform these actions via the context menu of the respective elements.

6.2.2 Arranging Topics

The structure of an Xtech document can also be arranged via the tree view. Thus, especially the re-use of topics is possible.

In order to alter the structure of an Xtech document, follow these steps:

1. Navigate into the desired Xtech document or topic.
2. Perform the desired "Insert Content" action:
 - Create Topic
Creates a new topic with the name given.
 - Paste Duplicate
Pastes a duplicate of a topic in the clipboard.

- Paste Shortcut
Pastes a shortcut of a topic in the clipboard.
- Insert Text Module
Enables the selection and insertion of predefined text modules.

Note: In the properties of a topic, on the “Topic” tab, you find the *Expression for the Restriction of Usage* field (see chapter 6.7 “Usage”). The topic is only visible in the publication when the expression is `true`. Hence, there can be several variants of documents.

6.3 Text Modules

Text modules allow for the re-use of content in numerous documents. The content of the referenced text modules is not transferred into the document until the text modules are resolved. Therefore, the document is always up-to-date. Furthermore, conditions can be defined to determine if a text module is visible. Hence, it is very simple to publish several variants of the same document.

There are two kinds of text modules:

- Static Text Module (Xeditor Section)
Allows users to write content of a chapter, yet not a topic itself.
- Static Text Module (Xeditor Topic)
Allows users to write a chapter with subchapters.

Text modules are managed by Xtechwriter administrators in the Xtechwriter configuration (“Text Modules” area). These text modules are made available in all shelves. Xtechwriter users can manage text modules in their respective shelves (“Templates and Presettings” action > “Text Modules” area).

6.3.1 Creating Text Modules

In order to create a text module, follow these steps:

Navigate into the Xtechwriter configuration or into the desired shelf to the *Text Modules* area.

1. Click the “Create Text Module” action.
2. Click the “Static Text Module (Xeditor Section)” or “Static Text Module (Xeditor Topic)” entry.
3. Set the metadata of the text modules (see the next section).
4. Click “Next”.
5. In the context menu of the text module, click “Edit”.
6. Write the desired content, click the “Save” button in the tool bar and close the Xeditor window.

Note: Text modules created in the Xtechwriter configuration must be released by clicking “Release for Usage” in the context menu before they can be used. Changes in the text modules must also be released via the “Re-Release” context menu command.

Metadata

The following metadata can be defined:

“Static Text Module” tab

- *Name*
The name of the text module.

- *Stylesheet*
Defines the stylesheet of the text module.
- *Text Module Categories*
The text module is offered upon inserting in an Xtech document under the defined categories.
Note: In the context of the Xtechwriter configuration, text module categories can be created directly in this field. Alternatively, the Xtechwriter configuration offers the “Define Text Module Categories” action.
- *Text Module Language*
Defines the language of the text module. When inserting text modules into Xtech documents, you can filter them by language.

“Usage” tab

- *Topic*
Defines the object classes and categories of topics in which the text module can be used.
Note: If a base form category is entered, the text module is also available to topics that were assigned a superordinate form category.
- *Xtech Document*
Defines the object classes and categories of Xtech documents in which the text module can be used.
- *Available Fields (Topic)*
Displays the fields available in the text module according to the definition in the *Topic* field.
- *Available Fields (Xtech Document)*
Displays the fields available in the text module according to the definition in the *Xtech Document* field.
- *Expression for the Restriction of Usage*
The text module is only visible in the publication when the expression is `true` (see chapter 6.7 “Usage”). Hence, there can be several variants of documents.

6.3.2 Using Text Modules

Text modules can be inserted either in the tree view via the “Insert Content” > “Insert Text Module” action or in the Xeditor via the toolbar (“Fabasoft Cloud” > “Insert Text Module”). The availability of the text modules is computed based upon the context (e.g. which topic the cursor is located in).

6.4 Fields

In the Xeditor, certain metadata can be inserted into the document. Select these fields in the toolbar via “Fabasoft Cloud” > “Insert Field” (e.g. *Valid From*).

6.5 Publications

Xtech documents can be published as PDF documents. This process takes the master data and the conditions of topics and text modules into account. The approval of the publication is handled via a default process which can be replaced with a custom process.

6.5.1 Publishing Xtech Documents

In order to publish an Xtech document, follow these steps:

1. Navigate into the desired Xtech document.
2. If you use the default process that supplied with the product or a custom process in which the reviewer of the Xtech document is also defined as a workflow participant, make sure that the *Reviewer* field of the Xtech document contains the desired value.
3. Click the “Publications” > “Publish” action.

A publication is created and, in it, the approval process is started.

The publication is placed in the “Publications” dashboard area and in the properties of the Xtech document (“Publications” tab). Additionally, publications are available via the “Publication” action of the Xtech document.

6.5.2 Approving Publications

The approval of the publication is handled via a default process which can be replaced with a custom process (see chapter 8.4 “Defining Default Processes”). The default approval process is implicitly started upon publishing.

The default process included in the product consists of the following activities:

- Forward for Approval
The process assigns this activity to the user referred to in the *Author* field.
 - Open
 - Open Properties
 - Comment
Comments can be inserted into a publication.
 - Forward for Approval
The publication is forwarded for approval to the user referred to in the *Reviewer* field of the Xtech document.
 - Discard
- Release Publication
The process assigns this activity to the user referred to in the *Reviewer* field.
 - Open
 - Open Properties
 - Comment
 - Release
 - Deny Release

Custom processes can also use the following publication-specific activities:

- File Publication
 - Open
 - Open Properties
 - File PDF Copy
 - Do Not File
- Register Publication
 - Open

- Open Properties
- Register PDF Copy
- Do Not Register

6.5.3 Publication Status

A publication can display the following statuses:

- In Progress
As soon as a publication is created, it receives this status.
- Discarded
The publication was discarded (e.g. "Discard" activity)
- Released
The publication was released (e.g. "Release" activity)
- Not Released
The publication was not released (e.g. "Deny Release" activity)

6.6 Master Data

Xtech documents can store master data in JSON format. This data can be considered in the publishing process.

In order to upload master data, follow these steps:

1. Navigate into the desired document.
2. Click the "Import Master Data" action.
3. Select a file containing the data in JSON format and click the "Upload" button.

The current master data of an Xtech document can be reviewed in "Properties" > "Master Data" tab.

Example

JSON file:

```
{
  "company": "Acme Ltd.",
  "formed": 2016,
  "active": true
}
```

Usage in a text module in the *Expression for the Restriction of Usage* field:

```
::document.xtdmasterdata.company == "Acme Ltd.";
```

6.7 Usage

For topics and text modules, users can define the usage. By using app.ducx expressions, it is very simple to publish numerous variants of a document.

In the global scope, the following variables are available:

- ::document
The document that is to be published.

- `::topic`
The superordinate topic.
- `::hierarchy`
The hierarchy between the document and the current-computed object.

Example

```
// Category of the document must match the custom category with the
// Fabasoft Cloud ID "COO.1.506.2.4710"
::document.objcategory == COO.1.506.2.4710;
// The custom form field of the superordinate topic must have the value "Value 1"
::topic.[#formstr1] == "Value 1";
// The subject of the superordinate topic have the value "Value 1"
// (-1 is the last topic within the hierarchy)
::hierarchy[HasClass(#XtechTopic)][-1].objsubject == "Value 1";
// The custom form field "formstr1" of the current topic must
// have the value "Value 1"
::coobj.[#formstr1] == "Value 1";
```

7 Using External Areas

For users who are not meant to have access to the entire Xtech document, external areas can be created. There, users can store additional information and create individual topics which can be linked to Xtech document via a shortcut.

7.1 Creating External Areas

An external area can be created for documents and for shelves. In order to create an external area, follow these steps:

1. Navigate into your Xtechwriter dashboard.
2. Click the "Create External Area" action.
3. Enter a name and select a shelf or an Xtech document that the external area belongs to.
4. Click "Next".

Note: A process is started for the preparation of the external area and depends upon your configuration. In the next section, the default process is described (see chapter 7.2 "Prepare External Area").

Note:

- In a shelf, you find all external areas assigned to either the shelf or an Xtech document contained in the shelf in the "External Areas" area.
- External areas can be accessed by all authorized users of the shelf and all authorized external users.

7.2 Prepare External Area

Once an external area is created, a process for the preparation of the external area is started. The process is dependent upon your configuration (see chapter 8.4 "Defining Default Processes"). The default process included in the product is described below.

In order to prepare and external area, follow these steps:

1. Create an external area (see chapter 7.1 "Creating External Areas").

2. Navigate into your worklist. You have received the “Prepare External Area” activity for the newly created external area.
3. Click the “Prepare External Area” work item.
4. Select the external users that shall have access to the external area.
5. Define a reviewer who shall review and approve the provided content.
6. Click the “Save” button.
7. Click the “Accept” work item.

7.3 Assigning Topics to an External Area

Topics can be assigned to an external area via the “Assign to External Area” context menu command. Thus, the topic only remains as a shortcut while external users can deliver contents for the topic.

8 Administrative Tasks

As an app administrator, you can create and manage shelves and stylesheets as well as define settings in the Xtechwriter configuration. If you have “Full Control” in a shelf, you can manage it.

8.1 Xtechwriter Configuration

In the Xtechwriter configuration, general settings can be defined and users can be authorized to use Fabasoft Xtechwriter.

The Xtechwriter configuration is created automatically when Fabasoft Xtechwriter is activated for your cloud organization. The owner of the cloud organization is initially authorized for the role of app administrator.

As an app administrator, follow these steps to switch to the Xtechwriter configuration:

1. Navigate into your Xtechwriter dashboard.
2. Click the “Switch to Configuration” action to enter the Xtechwriter configuration.

8.1.1 Areas

The Xtechwriter configuration is divided into the following areas.

Shelves

This area displays the available shelves. Further information regarding shelves can be found in chapter 8.2 “Managing Shelves”.

Stylesheets

This area displays all available stylesheets. Further information on stylesheets can be found in chapter 8.3 “Managing Stylesheets”.

Forms and Categories

This area displays the forms and categories provided by the Xtechwriter configuration. With the help of these, Xtech documents can be extended in order to, for example, save customer data. Categories can be assigned to objects and thus manipulate their behavior.

Further information on the definition of forms and categories can be found in the white paper “Model-Based Customizing”:

<https://help.cloud.fabasoft.com/index.php?topic=doc/Model-Based-Customizing/index.htm>

Processes

This area displays the processes provided by the Xtechwriter configuration. Users, organizations, organizational units and external organizations can be involved in handling business objects via the workflow by starting a process that can be executed via the worklist. Usually, these are approval and release processes.

Further information on the definition of processes can be found in the white paper “Model-Based Customizing”:

<https://help.cloud.fabasoft.com/index.php?topic=doc/Model-Based-Customizing/index.htm>

Templates

This area displays the templates provided by the Xtechwriter configuration. In the “Create” dialog (e.g. “New” context menu command), the templates are grouped according to the template categories.

Defining template categories for templates

In the “Create” dialog, the templates are grouped according to the template categories.

In order to define a template category, follow these steps:

1. Navigate into the Xtechwriter configuration and then into the “Templates” area.
2. Click the “Define Template Categories” action.
3. In the *Template Categories* field, enter the desired name of the template category and then click in the drop-down menu on “Click here to create the entered template category”.
4. Click “Define”.

The template category can be assigned to a template in its properties, on the “Template” tab in the *Template Categories* field.

Defining Xtech document templates

In order to define a new Xtech document template, follow these steps:

1. Navigate into the Xtechwriter configuration and then into the “Templates” area.
2. Create a new Xtech document (“New” action).
3. In the context menu of the document, click “Properties”.
4. Switch to the “Template” tab.
5. In the *Template Categories* field, select an existing template category.
Note: If there is not template category defined for a template, said template is categorized as an item of “Teamroom Templates” and offered as such in a “Create” dialog.
6. Click “Next”.
7. Write the desired content of the Xtech document.
8. In the context menu of the Xtech document, click “Release for Usage”.

Text Modules

This area displays the text modules that can be inserted into Xtech documents.

Defining text module categories for text modules

Text module categories define under which categories a text module can be found upon inserting it into a document.

In order to define a text module category for text modules, follow these steps:

1. Navigate into the Xtechwriter configuration and then into the “Text Modules” area.
2. Click the “Define Text Module Categories” action.
3. Click the “Add Entry” button and then click “New”.
4. In the *Name* field, enter the desired name for the text module category and click “Next”.
5. Click “Define”.

The text module category can be assigned to a text module in its properties via the *Text Module Categories* field.

Defining text modules

In order to define a text module, follow these steps:

1. Navigate into the Xtechwriter configuration and then into the “Text Modules” area.
2. Click the “Create Text Module” action.
3. Click the “Static Text Module (Xeditor Section)” or “Static Text Module (Xeditor Topic)” entry.
4. In the *Name* field, enter the desired name for the text module and click “Next”.
5. Click the “Edit” context menu command and write the desired content.
6. Click the “Release for Usage” context menu command.

Note:

- Text modules created in the Xtechwriter configuration must be released by clicking “Release for Usage” in the context menu before they can be used. Changes in the text modules must also be released via the “Re-Release” context menu command.
- In order to better organize your text modules, you can create a hierarchy of text module folders (“Create Text Module Folder” action).

Thesauri

This area displays the thesauri provided by the Xtechwriter configuration that allow tagging.

App administrators can create further thesauri and/or add new terms.

Presettings

This area displays the presettings provided by the Xtechwriter configuration (display settings and search forms).

App administrators can create search forms. It is also possible to save display settings in the configuration by clicking “View” > “Display Settings” > “Save” in a list.

Failed Background Tasks

This area displays failed background tasks (only visible when there is least one failed background task). You can perform the following manual actions: "Define Next Execution", "Send Link" and "Delete".

8.1.2 Settings

In the Xtechwriter configuration, you can define the following settings.

"General Settings" tab

- *Name*
The name of the configuration
- *Subject*
The description of the configuration.
- *Holiday Table*
Defines the holiday table that is used in the configuration (otherwise the default holiday table is used).
- *Restrict Shortcuts Within Teamroom*
Defines which kind of shortcuts can be pasted in the configuration. You can restrict the shortcuts to objects that are assigned to the organization or to the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
Allows you to restrict the team members who can download content to or open content on their device.
- *Roles That Are Allowed to Open or Download Content on the Device*
Defines which permissions a team member must have in order to open or download content at the device.
- *All Team Members May Add Members*
Defines if all team members are allowed to add users to the team or only team member with "Full Control".
Members with Change Access are able to grant Change Access or Read Access to other users (or withdraw it).
- *Restrict Team Members*
Defines organizations, organizational units, teams, and external organizations whose member can be add to the configuration. If the list contains no entries, members can be added unconditionally.
- *Enable Advanced Mode*
Advanced Mode includes, for example, working with several shelves and managing templates and presettings.
- *Main Administrator*
Defines the user who receives automatically generated e-mail messages regarding the configuration. Otherwise, all App Administrators receive the messages. The user is also named as a contact in the case of missing notification.
- *Support Team*
The support team handles the organization-internal management of support requests in the respective context.

- *Activate Trace Output*

As a form designer, if you apply expressions for computation or validation, errors in the expression might be difficult to identify. In order to speed up analysis, you can output trace results via the browser console (`coobj.Trace("string");` or `coobj.Trace("string", value);`).

“Logos” tab

The defined logos and the background image are applied to the configuration and all personal dashboards.

“Default Values” tab

- *Default Thesaurus for New Terms*

If a default thesaurus exists, new tags can be added directly.

- *Default Categories*

The default category as assigned to an object upon creation according to the defined object class.

Note: The default categories are also applied to shelves if they were explicitly defined for shelves. The same is true for Teamrooms stored in shelves and other rooms.

- *Default Processes*

When an object is created, the process is applied according to the defined object class.

Note The default processes are also applied to shelves if they were explicitly defined for shelves. The same is true for Teamrooms stored in shelves and other rooms.

- *Default Background Tasks*

When an object is created, the background tasks are applied.

- *Release Process for Templates and Presettings*

In order to use templates, text modules, form and categories, processes and presettings, they must be released. If the release is supposed to be initiated by a process, a BPMN diagram can be placed here. Release processes must contain the “Release for Usage” activity.

“Content Settings” tab

- *Allow Comments*

Defines if PDF comments can be attached to documents.

- *Allowed Types for Comments*

Defines the allowed types of comments (public or private)

- *Preferred Type for Comments*

Defines the default comment type when a comment is written (overrides the definition in the basic settings of the user).

- *Users With Read Access Are Allowed to Comment Publicly*

Defines if users with Read Access can write public comments.

- *Allow Public Links*

Defines if public links can be published.

- *Generate Cover Sheet for PDF Overviews of documents*

Defines if PDF overviews of documents generate cover sheets.

- *Use Watermarks*

Defines if documents are automatically converted into protected PDF documents with a definable water mark.

8.1.3 Roles

In the tool area of the Xtechwriter configuration, click the “Team” action in order to assign one of the following roles to user, teams or organizational units. Thus, users are authorized to use Fabasoft Xtechwriter, and the Xtechwriter dashboard is automatically placed on “Home”. Additionally, the roles determine the scope of action for the user.

- *App Administrator*
App administrator can manage configuration settings as well as create and manage shelves, stylesheets, forms and categories, BPMN processes, templates and text modules.
- *App User*
App users can manage Xtech documents. They must be authorized for their respective shelves.
- *App User (External)*
External app users (e.g. customers) gain given access to the external areas for which they are authorized. Furthermore, they can read publications.

8.2 Managing Shelves

Xtech documents are managed in shelves and assigned to the one shelf wherein their access rights are defined.

8.2.1 Creating Shelves

In order to create a new shelf, follow these steps:

1. Navigate into the Xtechwriter dashboard.
2. Click the “Create Shelf” action.
3. In the *Name* field, enter a title for the new shelf.
4. Click “Next”.

8.2.2 Areas

Shelves are divided into the following areas:

- *Xtech Documents*
Displays the Xtech documents in the shelf.
- *Publications*
Displays the publications in the shelf.
- *External Areas*
Displays the external areas in the shelf.
- *More Contents*
Displays the additional contents in the shelf.

8.2.3 Actions

You can perform the following actions:

- **Create Xtech Document**
You can create an Xtech document based upon a stylesheet.

- **Create External Area**
You can create an external area that belongs to a shelf or an Xtech document. External areas enable users to provide content when they do not have access to the actual Xtech document.
- **Show New Events**
You can display changes and events of the shelf.
- **Manage Follow-Ups**
With the help of follow-ups, you can arrange to have an e-mail sent to a user or a process started at a certain time.
- **Templates and Presettings**
Templates and presettings can not only be defined in an Xtechwriter configuration, but also for each shelf. Further information on the widgets can be found in chapter 8.1.1 "Areas".
- **Settings**
You can manage and edit general properties of the shelf (see chapter 8.2.4 "Settings")

8.2.4 Settings

In a shelf, you can define the following settings.

"General Settings" tab

- *Name*
The name of the shelf.
- *Subject*
The description of the shelf.
- *Holiday Table*
Defines the holiday table that is used in the context of the shelf (otherwise the default holiday table of the configuration or the default holiday table is used).
- *Restrict Shortcuts Within Teamroom*
Defines which kind of shortcuts can be pasted in the configuration. You can restrict the shortcuts to objects that are assigned to the organization or to the configuration. This way you can avoid pasting shortcuts that members of the shelf do not have access to.
- *Restrict the Downloading or Opening of Content on the Device*
Allows you to restrict the team members who can download content to or open content on their device.
- *Roles That Are Allowed to Open or Download Content on the Device*
Defines which permissions a team member must have in order to open or download content at the device.
- *Team Members With Read Access Visible to All Members*
Defines if all team members can see team members with Read Access. If the setting is deactivated, members with Read Access are only visible to members with Full Access. Beware that deactivating this setting also restricts further use cases.
- *Display Notifications for Users Without Rights to View the Team*
Defines whether events for team members who are not allowed to see the team are generally disabled. Otherwise, only events are displayed that do not allow any conclusions to be drawn about team members with read access.
- *All Team Members May Add Members*
Defines if all team members are allowed to add users to the team or only team member with "Full Control".

Members with Change Access are able to grant Change Access or Read Access to other users (or withdraw it).

- *Restrict Team Members*
Defines organizations, organizational units, teams, and external organizations whose member can be added to the configuration. If the list contains no entries, members can be added unconditionally.
- *Main Administrator*
Defines the user who receives automatically generated e-mail messages regarding the configuration. Otherwise, all App Administrators receive the messages. The user is also named as a contact in the case of missing notification.
- *Support Team*
The support team handles the organization-internal management of support requests in the respective context.
- *Activate Trace Output*
As a form designer, if you apply expressions for computation or validation, errors in the expression might be difficult to identify. In order to speed up analysis, you can output trace results via the browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

“Logos” tab

The defined logos are applied to the shelf.

“Default Values” tab

- *Default Thesaurus for New Terms*
If a default thesaurus exists, new tags can be added directly.
- *Default Categories*
The default category as assigned to an object upon creation according to the defined object class.
- *Default Processes*
When an object is created, the process is applied according to the defined object class.
- *Additional Background Tasks*
When an object is created, the background process is applied according to the defined object class.

Note: The default settings override or extend the setting in the configuration.

“Content Settings” tab

- *Allow Comments*
Defines if PDF comments can be attached to documents.
- *Allowed Types for Comments*
Defines the allowed types of comments (public or private)
- *Preferred Type for Comments*
Defines the default comment type when a comment is written (overrides the definition in the basic settings of the user).
- *Users With Read Access Are Allowed to Comment Publicly*
Defines if users with Read Access can write public comments.
- *Allow Public Links*
Defines if public links can be published.

- *Generate Cover Sheet for PDF Overviews of Documents*
Defines if PDF overviews of documents generate cover sheets.
- *Use Watermarks*
Defines if documents are automatically converted into protected PDF documents with a definable water mark.

Note: The content settings override the definitions in the configuration.

8.2.5 Roles

You can grant different access rights for every individual shelf. In the tool area, click the “Team” action in order to assign one of the following roles to users, teams or organizational units.

- **Full Control**
These team members have all access rights and can therefore
 - create new Xtech documents in the shelf, and edit or delete (wastebasket) existing Xtech documents,
 - create and define templates and text modules for the shelf,
 - create public links,
 - empty the wastebasket,
 - dissolve the entire shelf,
 - define settings regarding access protection, shortcuts, public links, visibility of teams, invitation options and organization restrictions,
 - define logos,
 - delete the history, and
 - grant all access rights.
- **Change Access**
These team members have change access rights and can therefore
 - create new Xtech documents in the shelf, and edit or delete (wastebasket) existing Xtech documents,
 - create and define templates and text modules for the shelf.
- **Read Access**
These team members have read access rights and can therefore
 - read existing Xtech documents, and
 - view release version if they exist.

8.3 Managing Stylesheets

Stylesheets define the XML schema and the notation of the media-neutral Xtech documents. They are managed in the Xtechwriter configuration in the “Stylesheets” area. You can create custom stylesheets or use the default stylesheet included in the product.

8.3.1 Creating Stylesheets

In order to create a stylesheet, follow these steps:

1. Navigate into the Xtechwriter configuration and then into the “Templates” area.

2. Click the "Create Stylesheet" action.
3. Define the desired settings. A detailed description of setting options is available in chapter 8.3.2 "Settings".
Note: The button "Refresh Preview" allows you to check your changes by means of a sample document.
4. Click "Create".
5. Click "Release for Usage" in the context menu of the stylesheet. Changes in the stylesheet must can be released via the context menu command "Re-Release".

Note:

- You can make alterations by clicking the "Edit Stylesheet" action.
- The "Set as Standard" action defines the stylesheet as the default. It is then preselected when creating an Xtech document.
- When creating an Xtech document, a stylesheet must be selected. The selection can be changed later if the new stylesheet is based upon the same XML schema.

8.3.2 Settings

A stylesheet offers the following settings:

"Stylesheet" tab

- *Name*
The name of the stylesheet.
- *XML-Schema*
Defines the XML schema used (currently supported: "Xeditor Schema Lightweight DITA").
- *Document for Previewing the Stylesheet*
Defines the document displayed in the preview area. This can be the default sample document, and any Xtech document or topic.

"Usability" tab

- *Applicable for*
The usability of the stylesheet is restricted to object classes and categories listed (e.g. Xtech document and topic).

"Page Setup" tab

- *Use Page Elements*
Defines which additional page elements (e.g. a footer) are displayed. Further settings can be defined for the selected page elements.
 - *Cover Page*
Defines the image and the text of the cover page (incl. their assigned CSS classes). The text can be selected from fields that are available based on the settings in "Usability".
 - *Back Cover*
Defines the image and the text of the back cover (incl. their assigned CSS classes). The text can be selected from fields that are available based on the settings in "Usability".
 - *Header*
Defines the header text and position (left, centered, right). The text can be selected from fields that are available based on the settings in "Usability".

- *Footer*
Defines the footer text and position (left, centered, right). The text can be selected from fields that are available based on the settings in “Usability”.
- *CSS*
Defines the styling for all elements in the PDF document. Use Print CSS for this purpose.

“Custom Content Classes” tab

- *Custom Content Classes*
Defines custom classes for styling elements.
 - *Name*
Defines the display name of the class.
 - *Elements*
Defines which elements the class can be applied to (e.g. note).
 - *CSS Class*
Defines the assigned CSS that is used for the styling.

“Styling” tab

- *CSS*
Define the styling for all elements in the document. These stylings are used to display the document in the editor and in the output PDF. Use CSS specifications.

8.4 Defining Default Processes

The default processes included in the product can be replaced with custom processes if needed. The processes can be stored in the configuration in order to apply to all shelves. In addition, a definition for each individual shelf (overrides the setting in the configuration).

In order to replace the included default processes, follow these steps:

1. Create the desired BPMN process in the Xtechwriter configuration (“Processes” area) or in a shelf (“Templates and Presettings” action > “Process Templates” area) and release it.
 - The *Applicable for* field defines the usage of the process. The specific activities described in the next section are therefor made available.
 - In order to use the process “Release Publication”, you need to restrict it to “Publication (App: Xeditor-Integration)” via the *Applicable for* field.
 - In order to use the process “Prepare External Area”, you need to restrict it to “External Area (App: Xtechwriter)” via the *Applicable for* field.
2. Define the previously created BPMN process as a default process in the Xtechwriter configuration or in the shelf (“Properties” action > “Default Values” tab > *Default Processes* field). The object class required corresponds to the usability (as previously described), depending on the process (“Publication (App: Xeditor-Integration)” or “External Area (App: Xtechwriter)”).

Release Publication

The following specific activities are available:

- Forward for Approval
Forwards the publication for approval.

- Release Publication
Releases the publication (or not). The publication receives the corresponding status.
Note: This activity must be used in the process so that it can replace the default process.
- File Publication
Deposits a PDF copy of the publication in a definable folder.
- Register Publication
Registers a PDF copy of the publication to, for example, a file.

Prepare External Area

The following specific activities are available:

- Prepare External Area
Defines the external members and the reviewer of the external area.
Note: This activity must be used in the process so that it can replace the default process.