Workflow Overview

With Scroll Versions you can update and manage your documentation in a fast and efficient way.

The process of using Scroll Versions is organized in the following steps:

Setting up Space

Scroll Versions must be activated on space level. You can either activate Scroll Versions in an existing space or you can create a new space and activate Scroll Versions in this new space.

There are three steps to activate Scroll Versions:

1. Activate the modules you want to use and define a name for your initial version.
   You can enable workflow management to control the state of each page. Besides you can activate the Variant Management functionality, to manage different variants in the same space.
2. Assign roles to your Scroll Versions users.
   Depending on your organizational structure, you have to define which users are Reviewers, Authors, and Doc-Admins for the specific space.
3. Define if you want to use the optional Enhanced Permalinks functionality.
   This enables duplicate page titles by using an enhanced permalink.

Adding Versions

A Doc-Admin can add versions that represent a product version, a special release, or even a different language. A version has a name, description (optional), and release date. You can also define a preceding version that is used as a basis for the new version. These dependencies are displayed in the version tree.

Authors can edit the page in the added version. If a page has no changes in a specific version, the content is retrieved from the previous version. This is called "fallback." For example, if a page has not been modified for version 2, the content of the page falls back to version 1. If there is a fallback in a specific page, the page info panel displays the message "This page has not changed in version [Versionname]."

Creating Variants

By using the variant functionality, it is possible to manage different product variants in a single space. Space- and Doc-Admins can create variants, to let Authors define which pages, or even which paragraphs are available in a specific variant. Variants consist of attributes with specific allowed values for this attributes.

Working on New Version

When a Doc-Admin adds a new version, Authors can edit the specific pages in this version. Before an Author edits a page, he must select the working version. This defines the version where the changes are made. All subsequent changes to pages in this space are scheduled for that version. Authors can create a new page, edit an existing page, or remove a page if it is no longer relevant in the version.
The working version is displayed at the top of the page, in the page info panel. When workflow management is active, the page status is also displayed. When the work on a specific page in the version is finished, Authors can change the status to ‘Review’, ‘Complete’, or restart the editing process by setting the page to ‘Draft’ status using the Restart option.

For context-sensitive help, Authors can set a unique page key for each page. A page key enables to link specific pages to specific user interfaces (context-sensitive help.)

If Variant Management is activated, Authors can define if a specific page, or a single paragraph is available for a specific variant.

To display changes, Authors can compare two versions or even compare whole spaces.

Publishing

When a specific version of the documentation is finished, Doc-Admins can publish the version. This means that the new version is available for the readers of the documentation. The finished version can be published within the same space, published to an existing space, or published to a new space. In either case, you have several publishing options: Copying the labels of all pages and the space itself, keeping original authors, creation dates and modification dates and – by publishing to the same space – removing historical and deleted versions of attachments. Additionally Doc-Admins can select a specific variant to publish. Before the version is published, a preview of all pages is displayed to show the status of each page and the change details.

There are two approaches to publishing a version. For more information, see public vs. private master space:

- Working in public master spaces: You publish the version to the same space you work in. All comments of your users are displayed through all versions.
- Working in private master spaces: You publish the version to a space different from the space you work in.

To save old versions or lock them, Doc-Admins can archive the version. Archived versions do not appear in the working version, but they can be unarchived for viewing.

Tip

If you need to export your documentation for high-quality printing, for context-sensitive help like EclipseHelp, or for static HTML please see the Scroll Exporter Plugins.