

General Bookstack overview and Training

Default Permissions

By default, all Revverers have edit permissions (note; this is a recent change; previously everyone was a view by default). Having edit permissions give you the ability to create, access, and edit all Books, Chapters and Pages, UNLESS restrictions have been added.

Restricting permissions for Books / Chapters / Pages

By default, any Book, Chapter, or Page you create will be viewable and editable by anyone in the company. If you need to add restrictions please follow this process:

1. Find out what Stack, Book, or Chapter you would like to change the permissions to. (By default, all Stacks have an Admin role assigned to it)
2. Slack McKay or open a ticket at ithelp@revverdocs.com and specify which Stack, Book, or Chapter you wish to be an admin for.
3. Once you have been added to a group, you can change permissions to be restricted to that (or other) groups.
4. **MAKE SURE THAT YOU DO NOT UNCHECK INHERIT DEFAULTS UNTIL YOU HAVE ADDED PERMISSIONS THAT YOU ARE A MEMBER OF.** If you do uncheck this box before adding additional permissions you will lose access.
5. See the graphic below for examples of how you could set permissions.

6.

Book Permissions

Set permissions here to override the default permissions provided by user roles.
Permissions set on books will automatically cascade to child chapters and pages, unless they have their own permissions defined.

Owner: Team Computer

| | | | | | |
|--|--|--|--|--|---|
| QA - Admin Able to edit QA pages | <input checked="" type="checkbox"/> View | <input checked="" type="checkbox"/> Create | <input checked="" type="checkbox"/> Update | <input checked="" type="checkbox"/> Delete | ✕ |
| Revverer (Editor) General edit permissions | <input checked="" type="checkbox"/> View | <input type="checkbox"/> Create | <input type="checkbox"/> Update | <input type="checkbox"/> Delete | ✕ |
| Dev - Admin Able to edit Dev pages | <input checked="" type="checkbox"/> View | <input type="checkbox"/> Create | <input checked="" type="checkbox"/> Update | <input type="checkbox"/> Delete | ✕ |

Override permissions for role: Select

| | | | | | |
|--|--|-------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Everyone Else Set permissions for all roles not specifically overridden. | <input checked="" type="checkbox"/> Inherit defaults | <input type="checkbox"/> View | <input type="checkbox"/> Create | <input type="checkbox"/> Update | <input type="checkbox"/> Delete |
|--|--|-------------------------------|---------------------------------|---------------------------------|---------------------------------|

QA HAS FULL ACCESS TO THIS BOOK
ALL EMPLOYEES CAN VIEW (BUT NOT EDIT OR CREATE)
DEVS CAN VIEW AND EDIT BUT NOT CREATE
DON'T UNCHECK THIS UNLESS YOU HAVE OVERRIDE PERMISSIONS OR ELSE YOU WILL NOT HAVE ANY PERMISSIONS (THE BOOK WILL NO LONGER SHOW UP FOR YOU)

Cancel Save Permissions

The Search bar is your best friend

See the search bar at the top of this screen?



This is easily the simplest and quickest way to find pages. Here are some examples you could look for:

- Wondering who is the admin for Marketo? Type in "marketo" to find out.
- Want to see the most recent org chart? Type in "org chart"
- Want to go back to this page but can't remember how? Type in "bookstack training" to find out.
- Want to practice using Bookstack? Type in "sandbox" to go to a sandbox Book. Please delete any Pages, Chapters, or Books that you create that are no longer needed.

Where to put private/personal pages?


The purpose of having an internal wiki like this is to share data with colleagues. While it is technically possible to create a private page (you would have to create a group and be the only one added to it) at this time it probably makes more sense to put personal documentation in Google Docs. Personal pages may become a feature of future Bookstack editions but you should not plan on this happening.

Features that you may not know about





Revision History

If you ever need to revert changes to a page, Bookstack allows you to view and revert back to any previous version of the page. To do this, click on the revision link in the upper right hand corner.

Details

 Revision #29

Once you are on the revisions page you can view or revert back to any previous version of the Page.

| | | | | |
|----|---|---|--|--|
| 28 | Who to contact for all the things! (WYSIWYG) |  | McKay Christensen 1 February 2024 17:07:19 (2 months ago) | Changes Preview Restore Delete |
| 27 | Who to contact for all the things! (WYSIWYG) |  | McKay Christensen 31 January 2024 18:42:27 (2 months ago) | Changes Preview Restore Delete |
| 26 | Who to contact for all the things! (WYSIWYG) |  | McKay Christensen 26 October 2023 20:07:44 (5 months ago) | Changes Preview Restore Delete |
| 25 | Who to contact for all the things! (WYSIWYG) |  | McKay Christensen 21 June 2023 20:22:39 (10 months ago) | Changes Preview Restore Delete |

Diagrams and Drawings

Within Bookstack you can create and edit diagrams and drawings. To do this, click on the ... in the WYSIWYG editor and select the drawing icon.

Diagram example

Paragraph ▾**B** *I* U A ▾  ...

...

 ▾ 

...


  

  ▾  



Once you are in the diagram edit page, you can create a diagram and save it. Once saved, it will be inserted into the Page.

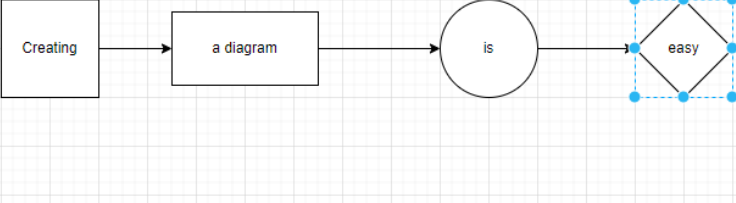
File Edit View Arrange Extras Help



Search Shapes

Scratchpad


General



Style

Text

Arrange



☒ Fill ☐ Gradient

Auto ▾

Find more information [about diagrams here](#).

Bookstack uses <https://app.diagrams.net/> for diagrams. If you simply need to just create a diagram and don't necessarily need to share it in Bookstack, you can go to <https://app.diagrams.net/> and create the diagram there. You can export or save the diagram in Google Drive or OneDrive.

Code Block

In the WYSIWYG editor you can embed a code block. The embedder allows you to select the language for color formatting.



```
import antigravity

def tell_joke():
    joke = """
    Why do programmers prefer dark mode?
    Because light attracts bugs!
    """
    print(joke)

if __name__ == "__main__":
    tell_joke()
```

Sharing Link to Specific Section (Headers)

Bookstack uses headers for easier navigation. If you need to share a specific section of your documentation, you can click on the header and copy that URL. So instead of sharing this:

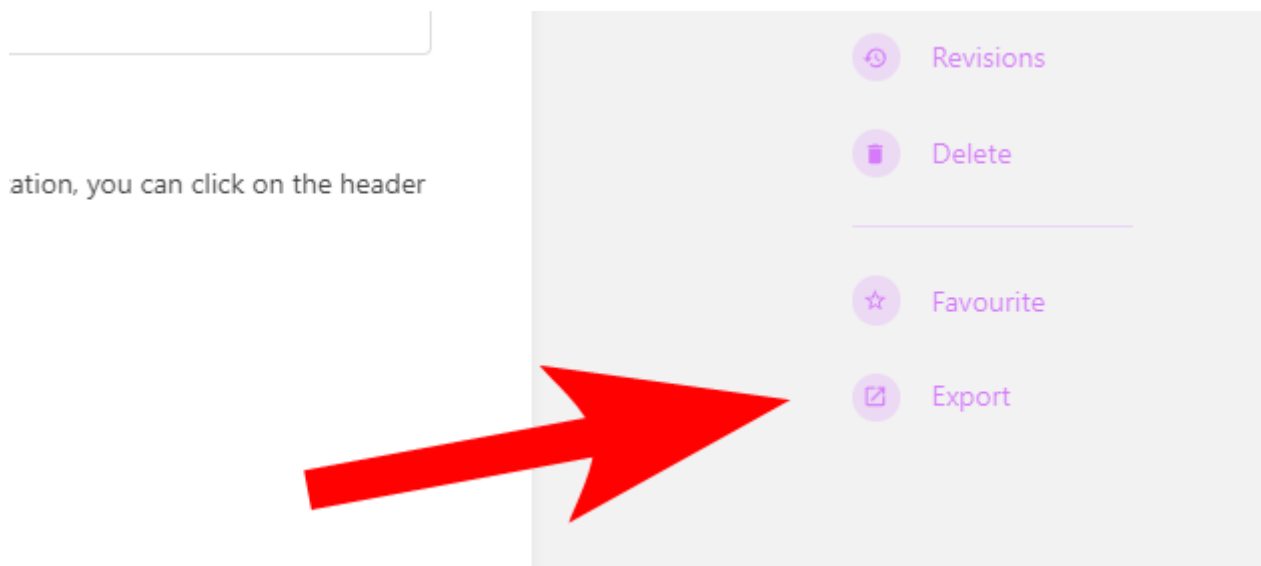
<https://internal.revverdocs.com/books/software/page/general-bookstack-overview-and-training>

You could share this:

<https://internal.revverdocs.com/books/software/page/general-bookstack-overview-and-training#bkmrk-sharing-link-to-spec>

Exporting Pages

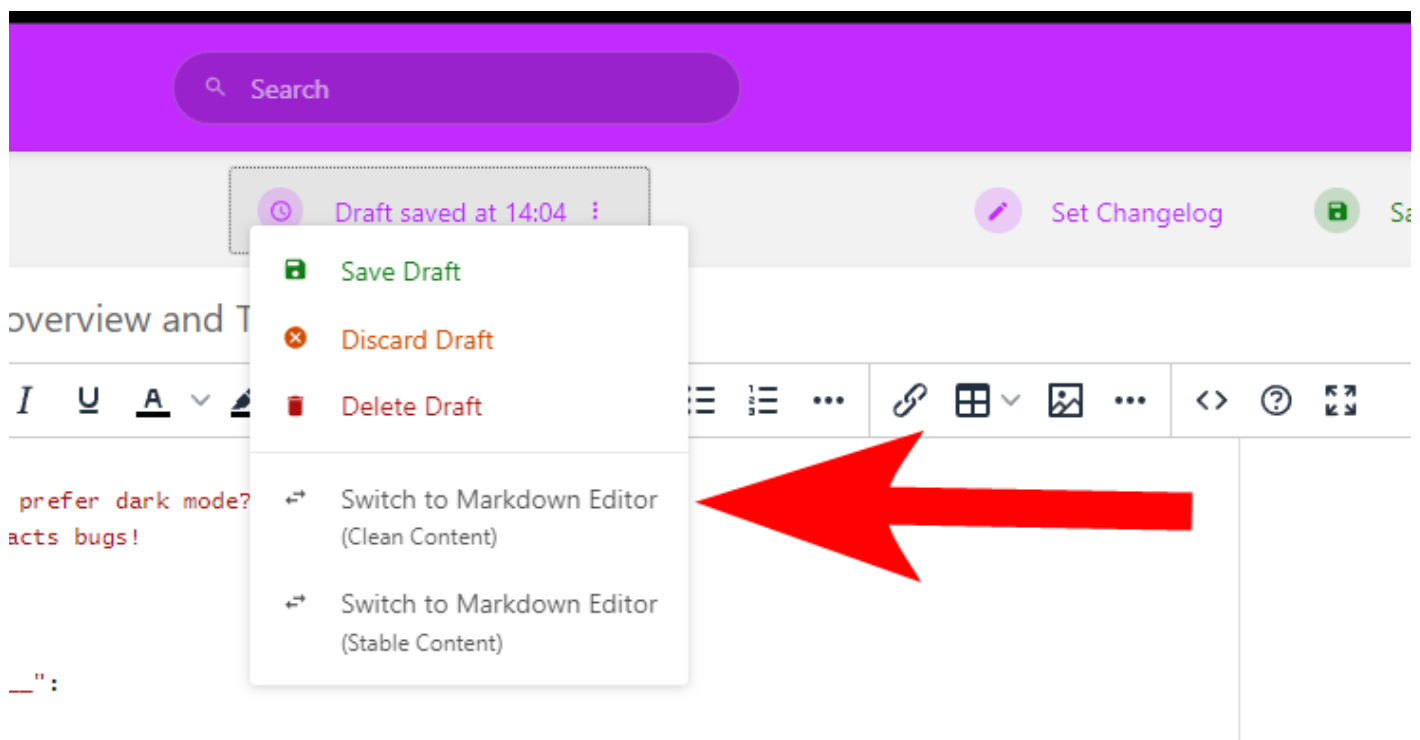
At the bottom right of the page there is an option to export a Book, Chapter, or Page.



This can be an extremely useful feature especially if you need to send documentation to people outside of the company.

Markdown Editor

If you enjoy torturing yourself, you can use markdown instead of the WYSIWYG editor. To do this just click on hamburger dot menu at the top of the page. Be aware that the change applies to EVERYONE for that page. The change can easily be reverted back however.



Sort or Move pages

On the right menu of a Book, Chapter, or Page, you have the ability to "Move" and sort items.

Move Chapter

Search

Helpful Links

Software

Salesforce

Salesforce, Salesforce CPQ, Salesforce Billing

QA

Onboarding Process

Process documentation and templates for the onboarding process

Sales Enablement Hub

CONTINUOUS SALES ENABLEMENT TO WIN AT SCALE Until we migrate all sales enablement content into...

Territory Information

Cancel

Move Chapter

Revision #13

Created 23 April 2024 20:44:36 by McKay Christensen

Updated 25 April 2024 16:30:30 by Team Computer