Bookstack Curriculum by Anjani

- Introduction to BookStack

Introduction to BookStack

Session 1: Understanding the Characteristics of a Good Knowledge Management System

Duration: 15-20 minutes

Theme: Understanding what makes a good knowledge management system

Methodology

1. **Ground Rules** (to be used in all sessions):
   - Bring only essential devices.
   - Mute mobile phones before the session begins.
   - Practice "Take Space, Make Space" to ensure equal participation.
   - Maintain a safe space with no discrimination in speech or action.
   - Emphasize that there are no right or wrong answers.

1. **Activity**:

Instructions for Participants

1. **Think of Your Favorite Tools**
   - Take a moment to think about the tools you use regularly to store, organize, and share information.
   - Examples: Google Docs, Notion, Microsoft OneNote, etc.
2. **List Two Key Features You Appreciate**
   - For each tool, write down **two key features** that you find most useful.
   - Example features:
     - **Real-time collaboration** (like in Google Docs)
     - **Easy search functionality** (like in Notion)
     - **Easy sharing and permissions** (like in Google Docs)
3. **Share in Groups**
   - Divide participants into small groups (3-4 people per group).

- Each participant shares the key features they noted.
- The group identifies the **top 3 features** that are most important for a good knowledge management system.

4. **Facilitator's Role**
   - While participants share their ideas, the facilitator should group the key features under broad categories like:
     - **Collaboration**
     - **Search & Navigation**
     - **Ease of Use**
     - **Customization**
     - **Access & Permissions**

Learning Outcomes:

- Learn what makes a good knowledge management system.
- Understand why simple design and clear structure are important for sharing knowledge."-friendly design and structure in effective knowledge sharing.

Session 2: Introduction to BookStack

Duration: 1 hours

Theme: Introduction to BookStack, its use, and capabilities

Methodology

1. **Ground Rules** (same as Session 1).
2. **Overview of BookStack**:
   - Briefly introduce BookStack as a platform for managing organizational knowledge.
     - BookStack is a simple, user-friendly platform used to organize and manage knowledge within an organization
   - Highlight its simplicity and its focus on a "Book > Chapter > Page" structure.
   - Show examples of how aikyam use BookStack for knowledge sharing.
3. **Facilitator Note**: Show a live example of BookStack (pattick) to give participants a visual understanding of its layout and features.

Materials Needed: Screen, Laptop, and Pre-prepared BookStack instance.

Outcome: Participants will understand the purpose of BookStack and feel ready to explore it.

Session 3: Creating an Account and Setting up BookStack

Duration: 20 minutes

Theme: Setting up a BookStack account

Methodology

1. Account Creation

- **Guide participants** to create their own BookStack account.
- Walk them through the steps to **log in** to the platform and **access the main dashboard**.
    - **Step 1**: Open a web browser and go to the **BookStack URL** shared by aikyam.
    - **Step 2**: Click on **Sign Up** or **Create Account**.
    - **Step 3**: Enter your **name**, **email**, and create a **password**.
    - **Step 4**: Click **Create Account** or **Sign Up**.
    - **Step 5**: Once registered, **log in** using the email and password.

2. Accessing the Main Dashboard

After logging in, you will see the **main dashboard**. This dashboard has sections for:

- **Books**: Where you store different knowledge collections.
- **Recent Activity**: View recent changes or updates made by others.
- **Search**: Quickly find content.
- **Familiarize participants** with navigating the dashboard to find Books, Chapters, and Pages.

Activity:

- **Hands-on Experience**

- **Set up a profile**: Once logged in, participants will set up their profile by clicking on their **profile icon** (top-right corner). Here, they can update their name, password, or profile picture.
- **Explore the dashboard**: Encourage participants to explore the dashboard and familiarize themselves with different sections like **Books** and **Recent Activity**.

Materials Needed: Participants' devices, shared BookStack instance URLs.

Outcome: Participants will have their own BookStack accounts and access to the dashboard.

Session 4: Dashboard Overview of BookStack

Duration: 30 minutes
Theme: Understanding the main features of the BookStack dashboard

Methodology

1. **Dashboard Tour**:
   - Show the layout of the BookStack dashboard and explain its sections:
     - **Books**: Collections of content like projects or organizational knowledge.
     - **Chapters**: Sub-sections of books, often used for larger topics.
     - **Pages**: Individual pieces of content, like articles or notes.
2. **Facilitator Instructions**:
   - Share your screen and explain each section in detail.
   - Show how to navigate between Books, Chapters, and Pages.

Outcome: Participants will understand the structure of BookStack and how to use its main navigation features.

Session 5: Creating Books, Chapters, and Pages

Duration: 30 minutes
Theme: Hands-on creation of content in BookStack

Methodology

1. **Content Creation Walkthrough**:
   - **Creating a Book**: Guide participants on how to create a new book, name it, and set its description.
   - **Creating Chapters**: Show how to organize chapters within a book.
   - **Creating Pages**: Teach participants how to create pages, add text, and format content using headers, bullet points, images, and embeds.
2. **Facilitator Instructions**:
   - Demonstrate the editor's features, such as adding images, links, and attachments.
   - Highlight the use of markdown and formatting options.
3. **Activity**:
   - Participants create their own Books, Chapters, and Pages.
   - Task them with creating one Book, three Chapters, and at least three Pages, using at least five of the editor's formatting features (like bold text, headers, lists, links, and images).

Outcome: Participants will be able to create, edit, and format Books, Chapters, and Pages in BookStack.

Session 6: Organizing and Structuring Knowledge

Duration: 1 hour

Theme: Organizing content effectively within BookStack

Methodology

1. **Content Organization**:
   - Explain the difference between Books, Chapters, and Pages.
   - Emphasize best practices for organizing knowledge logically and clearly.
2. **Facilitator Instructions**:
   - Show examples of well-structured Books with logical navigation and chapter breakdowns. (If we have any well scructured books)
3. **Activity**:

- Ask participants to create a structure for their own "Knowledge Guide" on a topic they are familiar with.

Outcome: Participants will be able to organize and structure their knowledge logically using Books, Chapters, and Pages.

Session 7: Page & Book Settings

Duration: 20 minutes
Theme: Understanding the differences in settings for Books, Chapters, and Pages

Methodology

1. **Settings Overview**:
   - Settings allow you to customize key properties for **Books, Chapters, and Pages** in BookStack. These settings control things like:
     - **Title and Description**: Set a clear name and description for easy navigation.
     - **Visibility and Access Permissions**: Decide who can view, edit, or delete the content.
     - **Tags**: Use tags to organize and classify content for better searchability.

2. **Facilitator Instructions**:

How to Access and Edit Settings for a Book

Steps to Access Book Settings

1. **Open the Book** you want to edit.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **"Settings"** from the dropdown menu.

What You Can Edit in Book Settings

- **Title**: Change the name of the Book.
- **Description**: Add or update a summary of the content in the Book.

- **Cover Image**: Upload a custom image to visually identify the Book.
- **Permissions**: Control who can **View**, **Edit**, or **Delete** the Book.
- **Tags**: Add tags to categorize and organize the Book for better searchability.

How Visibility Works for Books

- **Public**: Anyone can view it, even without logging in.
- **Private**: Only logged-in users can view it.
- **Custom**: You can grant access to specific user roles (like Admin, Editor, or Viewer).

How to Access and Edit Settings for a Chapter

Steps to Access Chapter Settings

1. **Open the Chapter** you want to edit.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **"Settings"** from the dropdown menu.

What You Can Edit in Chapter Settings

- **Title**: Update the name of the Chapter.
- **Description**: Write a short description or introduction to explain the contents of the Chapter.
- **Permissions**: Decide who can **View**, **Edit**, or **Delete** the Chapter.
- **Tags**: Add tags to help categorize the Chapter and improve searchability.
- **Move Chapter**: Transfer the Chapter to a different Book if needed.

How Visibility Works for Chapters

- **Inherited Visibility**: Chapters often **inherit permissions from the Book** they are part of.
- **Custom Visibility**: If needed, you can override the inherited permissions to allow different levels of access.

How to Access and Edit Settings for a Page

Steps to Access Page Settings

1. **Open the Page** you want to edit.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **"Settings"** from the dropdown menu.

What You Can Edit in Page Settings

- **Title**: Change the Page title.
- **URL**: Customize the URL for the Page
- **Visibility & Access Permissions**: Control who can **View**, **Edit**, or **Delete** the Page.
- **Tags**: Add tags to categorize and organize the Page for better searchability.
- **Move Page**: Move the Page to a different Book or Chapter.

How Visibility Works for Pages

- **Public**: Anyone can view it.
- **Private**: Only logged-in users can view it.
- **Custom Permissions**: Allow only specific users or roles to view, edit, or delete the Page.

Outcome: Participants will understand how to customize and manage access to content.

Session 8: Collaborating on Content

Duration: 15 minutes

Theme: Using BookStack for team collaboration

Methodology

1. **Adding Team Members**:
   - Show how to invite and manage users in BookStack.
   - Explain different roles (Admin, Editor, Viewer) and their permissions.
     - **Admin**: Full access to settings, users, and content.

    - **Editor**: Can edit and update content.
    - **Viewer**: Can only view content but cannot edit.
2. **Facilitator Instructions**:

Demonstrate the process of (1)inviting team members, (2)assigning roles, and (3)setting permissions.

- **Inviting Team Members**
    1. **Log in** to your BookStack instance with an **Admin account**.
    2. **Go to "Settings"**: Click on the setting at the top-right corner of the screen.
    3. **Select "Users"**: From the list of options, click on **"Users"**.
    4. **Invite a New User**:
        - Click the **"New User"** button.
        - Fill in the user's **name**, **email address**, and **password** (or you can let them set it themselves).
        - **Select the role** for the user (Admin, Editor, Viewer, etc.).
        - Click **"Save"**

- **Assigning Roles to Users**

1. **Access the User List**:
    - Go to **Settings > Users**.
2. **Find the User**:
    - Look for the user you want to update.
    - Click the **edit (pencil) icon** next to their name.
3. **Change the Role**:
    - Scroll to the "Role" section.
    - Choose from **Admin**, **Editor**, or **Viewer**.
    - Click **"Save"**.

> Users can have only one role at a time, but roles can be changed whenever needed.

- **Setting Permissions for Books, Chapters, and Pages**

Permissions can be customized for specific Books, Chapters, or Pages. This is useful when certain content should only be seen by certain users or roles.

1. **Go to the Content** (Book, Chapter, or Page) you want to set permissions for.
2. **Click on the "Lock" Icon**: This is located at the top-right of the page.
3. **Customize Permissions**:
   - Uncheck **"Inherit Permissions"** (if checked).
   - Click **"Add Permission"** and choose the specific role (Admin, Editor, or Viewer) or individual users.
   - Select whether they can **View**, **Edit**, or **Delete** the content.
4. **Save Permissions**: Click **"Save"** to apply the changes.

Example Scenario

- You invite **Priya** as a **Viewer** so she can only view content.
- Later, you change Priya's role to **Editor** so she can help update and add new content.
- You set custom permissions for the "HR Policies" Book so that only the **HR Team** can view or edit it.

Activity:

- Participants invite a "team member" (a fellow participant) and assign them as an Editor or Viewer.

Outcome: Participants will be able to add team members, assign roles, and collaborate on content.

Session 9: Revision, Move, Copy, and Watch Features

Duration: 20 minutes

Theme: Advanced content management features in BookStack

Methodology

Overview of Features:

Revisions:

How to View Page Revisions

1. **Open the Page** you want to review.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **Revisions** from the dropdown menu.
4. **Revision History** will appear, showing a list of changes with details such as:
   - **Date & Time** of the change.
   - **User** who made the change.
   - **Change Description** or summary of the changes (if applicable).
   - **Version Number** to identify specific versions.
5. **View the Differences**: Click on a specific revision to see a comparison (or "diff") of what changed in that version versus the previous one.
6. **Revert to Previous Version**:
   - If you want to restore an earlier version, click the **Revert** button next to that version.
   - Confirm the action to **restore the page to that version**.

How to Revert to a Previous Version

1. **Open the Page**.
2. Access the **Revision History** (follow steps 1-3 from above).
3. Scroll to the version you want to restore.
4. Click **Revert** next to the version.
5. Confirm the action to **restore the previous version**.
6. The page will update, and the latest version will reflect the restored content.

Why Revisions Are Important for Collaboration

- **Track Changes**: You can see who made changes, when they were made, and what was changed.
- **Correct Mistakes**: If an error was introduced in a recent edit, you can easily roll back to an earlier version.
- **Improve Collaboration**: Team members can work on the same content, and if issues arise, previous versions can be restored.
- **Accountability**: Keeps a record of who made each change, which is useful in team environments where multiple people work on the same content.

Move:

How to Move a Page from One Book to Another

Steps to Move a Page:

1. **Open the Page** you want to move.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **Move** from the dropdown menu.
4. A **Move Page Window** will appear.
5. Choose the **Book** where you want to move the Page.
6. If needed, choose the **Chapter** within that Book (optional).
7. Click **Move Page** to confirm.

Notes:

- If you move a Page to a different Book **without selecting a Chapter**, it will be placed at the top of the Book.
- If you move it into a Chapter, it will be placed under that Chapter

How to Move a Chapter from One Book to Another

Steps to Move a Chapter:

1. **Open the Chapter** you want to move.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **Move** from the dropdown menu.
4. A **Move Chapter Window** will appear.
5. Choose the **Book** where you want to move the Chapter.
6. Click **Move Chapter** to confirm.

Notes:

- When you move a Chapter, **all the Pages inside the Chapter will move with it**.
- Chapters can only be moved from one Book to another. They cannot be moved into other Chapters.

Action	Where to Access	What You Can Do
Move a Page	Page > More Options > Move	Move a Page to a different Book or Chapter
Move a Chapter	Chapter > More Options > Move	Move a Chapter (and its Pages) to another Book
Check Structure	Dashboard	Review content placement for logical flow

Copy:

How to Copy a Page

Steps to Copy a Page:

1. **Open the Page** you want to copy.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **Copy** from the dropdown menu.
4. A **Copy Page Window** will appear.
5. Choose where you want to place the copied Page:
   - **Select a Book**: Choose the Book where the copy will be stored.
   - **Select a Chapter (Optional)**: If you want the Page to be inside a Chapter, select it.
6. **Rename the Copied Page** (optional). By default, it will have the same name as the original.
7. Click **Copy Page** to confirm.

Notes:

- You can create multiple copies of the same Page in different Books or Chapters.

If you forget to rename the Page, you can do it later by editing its **Settings**.

How to Copy a Chapter

Steps to Copy a Chapter:

1. **Open the Chapter** you want to copy.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **Copy** from the dropdown menu.
4. A **Copy Chapter Window** will appear.
5. Choose where you want to place the copied Chapter:
   - **Select a Book**: Choose the Book where the copy will be stored.

6. Click **Copy Chapter** to confirm.

Notes:

- When you copy a Chapter, **all the Pages inside the Chapter are copied too**.
- This is useful if you want to duplicate a Chapter with its entire content, like templates for training guides or user manuals.

Watch:

How to "Watch" a Book, Chapter, or Page

Steps to Watch Content

1. **Open the Book, Chapter, or Page** you want to watch.
2. Click on the **More Options (three dots)** in the top-right corner.
3. Select **"Watch"** from the dropdown menu.
4. Once you click **Watch**, you will be subscribed to updates.
5. You will now receive notifications for any changes made to that content.

What Happens Next?

- Whenever someone edits or updates the Book, Chapter, or Page you are watching, you will receive a **notification**.
- Notifications may appear via email (if enabled) or as **in-app notifications** in BookStack.

How to Manage Watch Notifications in User Settings

If you want to manage your watch notifications (like turning them off), follow these steps:

Steps to Manage Watch Notifications

1. **Click on Your Profile Icon** (top-right corner of the dashboard).
2. Select **Settings** from the dropdown menu.
3. Look for the section called **Watch Notifications**.
4. Here, you can manage your watch list:
   - **View the Books, Chapters, or Pages you're watching**.
   - **Unwatch** any content you no longer want to track.

5. If email notifications are enabled, you may also be able to toggle **email alerts** on or off.

Why Use the Watch Feature?

- **Stay Informed**: Get alerts when changes are made to important content.
- **Track Changes**: If a document is being edited by multiple people, you'll know when updates happen.
- **Avoid Missing Updates**: Useful when tracking **critical pages** like policies, guides, or procedures.

Activity:

- Each participant creates a new Page, makes several edits, and then reverts to an older version.
- They will then export the page to a PDF and move or copy it to another Book.
- Finally, they will "watch" one of the Books and check for notifications of changes.

Outcome: Participants will be able to use advanced features like Revision, Export, Move, Copy, and Watch for better content control and collaboration.

Session 10: Customization, Theme Settings, and Final Q&A

Duration: 30 minutes

Theme: Customizing themes, site settings, and Q&A session

Methodology

1. **Customization**:
   - Teach participants how to customize themes and set the site's logo, title, and homepage layout.

Customizing the theme allows you to change the overall look and feel of your BookStack site. This includes changing colors, fonts, and layout styles.

Steps to Customize the Theme:

1. **Log in** as an Admin.
2. Go to **Settings** (found in the side navigation).

3. Select **Appearance/Customization** (or "Site Settings," depending on your version of BookStack).
4. Here, you can adjust various aspects of the theme, such as:
   - **Primary Color**: Change the main color used in headers, buttons, and highlights.
   - **Secondary Color**: Choose a secondary color to complement the primary color.
   - **Custom CSS/HTML**: If you have advanced customization needs, you can add your own CSS or HTML code.

> “ Customizing the theme allows your organization to match BookStack’s appearance with its brand colors, making the system look more professional and familiar to users.

Setting the Site’s Logo

Adding a logo makes your BookStack site feel more branded and official.

Steps to Set the Logo:

1. Go to **Settings** and open the **Site Settings** tab.
2. Look for the option to upload a **Logo**.
3. Upload an image file (like PNG or JPG) from your computer.
4. Save the changes.

> “ The logo appears at the top of every page, making the platform feel like part of your organization's official tools. It also improves brand recognition for users.

Setting the Site’s Title

The site title is the name that appears in the browser tab and on the homepage.

Steps to Set the Site’s Title:

1. In the **Settings** menu, go to **Site Settings**.

2. Find the **Site Title** option.
3. Enter the name of your site (e.g., “Aikyam Knowledge Hub” or "Team Documentation").
4. Save the changes.

> “A proper site title gives context to users about what the platform is for. It also helps with SEO (search engine optimization) and makes it easier for users to recognize your site in browser tabs.

Setting the Homepage Layout

The homepage layout controls what users see when they first visit the site. You can decide to display a welcome message, specific books, or other content.

Steps to Set the Homepage Layout:

1. Go to **Settings** and open **Site Settings**.
2. Look for the **Homepage Content** option.
3. You can choose what content to display:
   - **List of Books**: Display a list of all Books.
   - **Custom Welcome Page**: Set up a custom page as the homepage.
4. Save the changes.

> “Setting a homepage layout helps new users understand the purpose of the site immediately. It provides quick access to important content, making navigation easier.

Show how to manage settings like default visibility and export options.

Steps to Manage Visibility Settings

1. **Log in to BookStack** as an Admin or a user with permissions to change visibility.
2. **Go to the Dashboard** and select the content (Book, Chapter, or Page) for which you want to set visibility.
3. **Access the Settings**:

- Click the **three dots (More options)** next to the Book, Chapter, or Page.
- Select **Permissions** or **Settings** from the menu.

4. **Enable Custom Permissions**:
   - Toggle the **Custom Permissions** option ON.
   - Choose the users or roles (like Admin, Editor, Viewer) who can **View**, **Edit**, or **Delete** the content.
5. **Save Changes**: Click the **Save** button to apply the new visibility rules.

Types of Visibility

- **Public**: Anyone, even users without a login, can view the content.
- **Private**: Only logged-in users can see the content.
- **Custom**: You decide which users or roles have access to View, Edit, or Delete the content.

Steps to Export Content

1. **Open the Book, Chapter, or Page** you want to export.
2. **Access Export Options**:
   - Click the **three dots (More options)** at the top-right corner.
   - Select **Export** from the dropdown menu.
3. **Choose Export Format**:
   - Select the file format you want:
     - **PDF**: Ideal for printing or offline sharing.
     - **HTML**: Useful for embedding the page in a website.
     - **Plain Text**: Useful for a clean text-only version.
4. **Download the File**: Once exported, the file will be available to download.

Activity: Participants customize the site logo, title, and homepage.

Outcome: Participants will know how to customize the appearance and functionality of their BookStack instance.

Learning Outcomes for the Entire Module

- Understand the purpose of BookStack for knowledge management.
- Create Books, Chapters, and Pages.

- Customize content using various formatting features.
- Add and manage users, roles, and permissions.
- Able to use advanced features.
- Know how to customize the appearance and functionality of their BookStack instance.