

Documents

With the **Documents add-on** you can create and design comprehensive text documents in i-doit. You can complement these documents with information from the IT documentation in many ways. From operating manuals to emergency plans and much more - you can create any type of documentation.

Configuration

A technical configuration of the add-on after [installation](#) is not necessary.

Contents

Rights Assignment

After you installed the add-on, person groups and persons in i-doit do not have permission to access the add-on (exception: [default person group "admin"](#)).

You can assign permissions via **Administration** **Authorization system** **Rights** **Documents**.

Here you can define the following permissions:

- Document
- Template
- Chapter
- Online Repository

With the `Document` item you can assign the permission to edit single or any documents.

The item `Template` allows creating and editing of document templates.

Similar is the editing of chapters. You can allow access to chapters with the `Chapters` item.

In order to see the online repository and to download data you can use the `Online Repository` item.

Use of the Add-on

After installation and rights assignment, the add-on is available under **Extras** **Documents**.

WYSIWYG Editor

Generally, editing of content is carried out with a so-called WYSIWIG editor. The letters stand for "What you see is what you get". This means that content in the editing view already corresponds to the view of the finished document.

It is also possible to work with a view where you can separate design and content of each other. For this purpose, press the **source code** button. Beside the known buttons for formatting texts there are buttons for the integration of current information from i-doit into the document.

Here you can use placeholders which later automatically complement the selected [attributes](#) at the corresponding location in the document. It is possible to integrate properties of the main [object](#) to which the document is assigned to and attributes of objects defined before. Moreover, you can insert reports and complement standard contents (author, date etc.) as so-called templates.

Templates

Templates provide the basis on which you can create documents. When you generate a new template, assign a name and select the category of the document as a first step.

Before, you can also edit the header and footer line as well as carry out settings regarding the table of contents, margins and page numbers.

After you created the template of the document, the chapter overview is available. Here you can edit single chapters, adapt the sorting of the chapters or delete chapters. Furthermore, you can generate subordinated chapters in a secondary level. The buttons for these processes are viewed if you hover with the mouse over the corresponding chapter.

You can move chapters by using the drag- and-drop function.

Already created templates are sorted according to their category in the tree menu on the left side.

You can download a document template by using the **Export template** button. You can import these templates into any i-doit installation which has the document add-on.

Carry out the import process in the template overview of a category with the **Import template** button.

Creation of Documents

Based on templates and attributes of selected objects you created before, you can generate new documents in existing documents.

Activate the overlay with the **new** button and select the template to be used as well as the desired objects. An individual document will be created for every selected object. This object is the main object and its details replace the corresponding placeholders in the document. In addition, you can add a description to provide further information about the document.

After the documents were generated, you can download and save them in HTML and PDF format with help of the buttons.

Automatic Creation of Documents

You can use the [i-doit controller](#) to generate new revisions of a document automatically. With the `document` handler and the parameter `-t <ID of the document>` you can enable an automatic process in the background. The `-t` parameter accepts a comma-separated list of IDs:

```
./controller -u admin -p admin -i 1 -v -m document -t 1,2,3
```

Online Repository

The online repository is an access point which supplies templates for different document types. This repository is updated with new default templates on a regular basis. You can retrieve the templates online via the import function and integrate them into your i-doit installation.