

REBEL SOFTWARE · RebeIPSA

Documentation Center Guide

How knowledge base articles, runbooks, templates, and search work in RebeIPSA's Documentation Center.

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Contents

1. About This Guide
2. Core Philosophy: Simple on the Surface
3. Your Dashboard: Built for Your Role
4. Creating a Document: One Click to the Editor
5. Viewers & Editors: What RebelPSA Can Open
6. Where Your Documents Go: Storage Routing Rules
7. Structured Templates & Asset Layouts
8. Runbooks & PM Checklists: The Process Engine
9. Visibility & Publishing to the Customer Portal
10. Search: Finding Anything, Fast
11. AI Enhancements: What's Optional On Top
12. Common Workflows
13. Quick Reference & Glossary

1. About This Guide

This guide covers RebelPSA's Documentation Center — where your organization's knowledge base articles, runbooks, technical manuals, client-facing templates, and structured client data lives. It's built around a single design philosophy: feature-rich underneath, simple and intentional on the surface.

Tip. *A theme runs through this entire module: nothing here ever requires AI to function. Search, creation, routing, templates, and checklists all work completely on their own. AI is layered on top as an optional enhancement — never a dependency — which matters if your organization hasn't enabled AI, or can't for certain document classes.*

2. Core Philosophy: Simple on the Surface

A few non-negotiable design rules shape everything else in this guide, and they're worth knowing up front because they explain why certain things work the way they do:

- Document creation reaches an editor in a single click — never a redirect to a page that just contains another "Create" button.
- Your dashboard shows what's relevant to your role automatically, without manual setup.
- Internal documents are never exposed to a customer without someone explicitly choosing to publish them.
- Every document, regardless of type, renders through the same underlying viewer — so Word, Excel, PDF, and Markdown all feel consistent rather than like different tools bolted together.

3. Your Dashboard: Built for Your Role

The Documentation Center dashboard automatically adapts to who's looking at it, detected from your existing permissions — no setup required on your part:

Role	Detected By
Technician	Help Desk Agent permission
Manager	Help Desk Supervisor or Documentation Manager permission
Sales	Sales permissions
Finance	Finance permissions

Each role view keeps to a focused 5–9 elements rather than a dense widget wall, with secondary information tucked behind expandable sections. Empty widgets ("No recent runbooks," etc.) stay hidden

until they have something to show you.

Tip. *If your role view doesn't feel right, you can manually override which view you see — your preference is remembered going forward.*

A single, prominent search bar sits at the top of the dashboard and handles both a quick title search and a full global search — see Section 10.

4. Creating a Document: One Click to the Editor

Every document type is created the same way, and it always reaches an editor in one step:

- Click a document type from the dashboard's action bar (Word Document, Excel Spreadsheet, Markdown, Knowledge Base Article, Runbook, and others).
- A slide-over panel appears on the right — no page navigation. The title field is already focused, ready to type.
- Enter a title, and optionally set a folder/routing destination, tags, and visibility.
- Click Create. The panel closes and the appropriate editor opens immediately, inline.

Everything you can create from this panel:

Documents	Records & Structures
Word Document, Excel Spreadsheet, Rich Text Note, Markdown Document, Plain Text File, PowerPoint Presentation, Upload File(s)	Knowledge Base Article, Runbook (Process), Asset Template, Folder/Space, External Link, Credential Shortcut, PM Checklist

Tip. *Your work autosaves roughly every 30 seconds in the editor, with a clear unsaved indicator in the title bar and a toast if a save ever fails.*

5. Viewers & Editors: What RebelPSA Can Open

Every supported file type opens through the same centralized viewer, so behavior stays consistent no matter where in RebelPSA you're opening a document from (a ticket attachment, a CRM record, or the Documentation Center itself).

Type	Viewer	View	Edit
Word (.docx, .doc)	Full document editor with ribbon	Yes	Yes

Type	Viewer	View	Edit
Excel (.xlsx, .csv)	Spreadsheet editor	Yes	Yes
PDF	PDF viewer	Yes (annotate)	Yes (sign)
PowerPoint (.pptx)	Presentation viewer	Yes	—
Image (.png/.jpg/.gif/.webp)	Image editor	Yes	Yes (basic)
Markdown (.md)	Rich text editor (Markdown mode)	Yes	Yes
Rich Text (.html/.rtf)	Rich text editor	Yes	Yes
Code / plain text (.txt/.json/.yaml/.xml)	Syntax-highlighted code editor	Yes	Yes
Unknown / unsupported	Metadata panel + download	Yes	—

6. Where Your Documents Go: Storage Routing Rules

Rather than everything landing in one default location, your organization can define routing rules that automatically send a document to the right storage location based on its type, category, audience, or tags.

Rules are evaluated in this order, and the first match wins:

- Explicit admin-defined rules, in priority order.
- Category defaults (for example, Finance documents route to a specific Finance storage location).
- Audience defaults (for example, Sales collateral routes to a specific Sales library).
- Your tenant's baseline default storage.
- The Drop-Off inbox — a catch-all for anything that doesn't match any rule, clearly flagged as needing to be filed.

Tip. If you ever notice a document that seems to have landed in the wrong place, check the Drop-Off inbox first — it exists specifically so nothing gets silently lost, and it shows a suggested rule for each unfiled item.

7. Structured Templates & Asset Layouts

Beyond free-text documents, RebelPSA supports schema-driven templates for information that should be captured consistently across every client — an Asset Layout defines a named set of typed fields, and an Asset Instance is the actual per-client record filled in against that layout.

Field types available when building a layout include text, multi-line text, rich text, number, currency, date, checkbox, single/multi-select, email, URL, phone, IP address/CIDR, a linked credential reference, a linked asset/device reference, a linked document reference, and embedded diagrams.

A set of ready-to-use global templates comes standard, including Client Network Overview, Device Configuration, Client Onboarding Checklist, Security Incident Response Procedure, Vendor Contract Summary, Sales Proposal/Collateral Record, Financial Document Index, and Technical Manual Index.

Variable Placeholders in Document Templates

For regular rich-text or Word templates (as opposed to structured Asset Layouts), you can use placeholders like {{ClientName}}, {{TechnicianName}}, {{Date}}, {{TicketId}}, and {{CompanyName}}, plus any custom variables your organization has defined. Creating a document from a template with unfilled placeholders opens a quick resolution panel to collect those values before the editor opens.

8. Runbooks & PM Checklists: The Process Engine

Runbooks and checklists are first-class objects with real execution tracking — not just free-text documents that happen to describe a procedure. Two separate but connected things make this work:

- **Process** — the reusable template: a name, description, category, and an ordered set of steps. Each step can be a plain instruction, a confirmation checkbox, a typed data-capture field, a document attachment, a credential reference, or an external link.
- **Process Run** — a live, in-progress execution of a Process against a specific ticket, client, or asset — with an assignment, a due date, and per-step completion tracking.

A run's status moves through Not Started, In Progress, Blocked, Completed, and Archived. Your active runs surface directly on your dashboard under "My Active Checklists," so you never have to go hunting for what you're mid-way through.

Tip. You can generate a shareable, read-only link to a run's progress — useful for keeping a client or manager updated without requiring them to have a portal login. The link is time-limited rather than permanent.

A PM Checklist is simply a Process with a recurrence schedule attached, tying it into the Scheduling module so it fires automatically on a cadence rather than needing to be started by hand every time.

9. Visibility & Publishing to the Customer Portal

Every document and record carries one of three visibility tiers, and this is the mechanism that keeps internal material internal until someone deliberately decides otherwise:

Tier	Who Sees It
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Internal	MSP staff only. This is the default for every new document and is never exposed to the Customer Portal regardless of any other setting.
Team	Members of one or more specified internal teams — still entirely internal, just narrower than all-staff.
Published	Intentionally shared to the Customer Portal, requiring an explicit Publish action.

Publishing is deliberate and reversible:

- From the document's action menu, choose Publish to Portal.
- A confirmation shows exactly which clients will see it, the visibility setting, and an optional expiry date.
- The document appears in the client's portal document list, rendered read-only.
- Choosing Unpublish immediately returns it to Internal — portal access is revoked right away.

Important. *Runbooks never publish automatically, no matter how they're tagged or categorized — publishing is always a manual, explicit action. This is intentional: an internal-only procedure should never leak to a customer because of a routing rule or a template default.*

10. Search: Finding Anything, Fast

Search runs on a comprehensive index that works completely independently of AI — titles, body content, tags, metadata, asset template field values, and process step text are all indexed and searchable without any AI feature turned on.

- Fuzzy matching handles typos and transpositions.
- Phonetic matching helps with name searches ("Johnsn" still finds "Johnson").
- Title and tag matches rank above body matches, and recently modified documents get a small recency boost.

The same search bar handles both a quick, instant title search and, on pressing Enter or Search, a full global search with filters for document type, category, visibility tier, date range, author, and tags. Results group by type (Documents / KB Articles / Runbooks / Asset Records) and can be sorted by relevance or date.

Tip. *You can save a search (query plus filters) with a name, and it'll appear as a favorite on your dashboard — handy for a search you run often, like "vendor contracts expiring this quarter."*

11. AI Enhancements: What's Optional On Top

Every AI feature here is strictly additive — its dismissible, optional, and never required for the underlying workflow to function. If your organization hasn't enabled AI, none of the following appears, and nothing else in this guide changes.

- Semantic re-ranking of search results, with AI-influenced results subtly marked so you know why they're there.
- "Did you mean?" suggestions for a low- or zero-result search.
- Natural-language query parsing — typing something like "show me vendor contracts expiring this quarter" and having it resolve to the right structured filters.
- A dismissible outline suggestion when starting a new document.
- Smart SOP generation — describe a procedure in plain text and get back a structured, step-by-step document ready to refine in the editor.
- Stale document detection, flagging documents that haven't been touched in a while and show signs of being out of date.
- Duplicate detection, surfacing near-duplicate documents for you to merge or archive.

12. Common Workflows

Writing a new KB article from scratch

- Click Knowledge Base Article from the dashboard action bar.
- Enter a title, set its category/tags, and leave visibility at Internal for now.
- Write the article in the editor — it autosaves as you go.
- Once it's ready for customers to see, use Publish to Portal from the article's action menu.

Running a PM checklist on-site

- Open the run from your "My Active Checklists" dashboard widget or start a new one from the relevant Process.
- Work through each step, checking off confirmations and entering any required data as you go.
- Mark the run Completed when finished — the record stays in history rather than disappearing.

Finding a document you know exists but can't quite remember the name of

- Use the global search bar with a few keywords, even if you're not sure of the exact title — fuzzy matching covers small misspellings.
- Narrow using the type, category, or date filters if you get too many results.
- Save the search if it's something you expect to need again.

13. Quick Reference & Glossary

Term	Meaning
Process	A reusable runbook/checklist template — an ordered set of steps.
Process Run	A live, in-progress execution of a Process against a specific ticket, client, or asset.
Asset Layout	A schema defining a named set of typed fields for structured client data.
Asset Instance	A specific client's filled-in record conforming to an Asset Layout.
Drop-Off Inbox	The catch-all location for documents that didn't match any storage routing rule.
Visibility Tier	Internal, Team, or Published — controls who can see a document, including whether it's Customer Portal-visible.
Variable Placeholder	A token like {{ClientName}} in a document template, resolved to a real value at creation time.
Semantic Re-Ranking	An optional AI layer that reorders base search results — never a replacement for the underlying search index.