EditOBS

Contents

1 Help:EditOBS

1.1 General

- Before editing, you should log in - the Assist system will not allow you to edit the documents unless you have, so that all changes can be tracked to the user that made them.
- You should change your user page within Assist to list your contact details (email and phone number) so that other users can easily contact you.
- You can add to a user's talk page by clicking on their name and clicking the Discussion tab.

1.2 Document Editing

- When creating a new document, you should ensure that the Category tags are added relevant to that document type and client. This allows for easy searching of documents.
- Each change you make, however small, is included in the document's history. To ensure that these comments are not included, you should mark the change as minor when saving your changes. However, this should not be marked as minor if the edit fundamentally changes the document.
- Comments should be added whenever saving edits. If you have edited a section directly, rather than the whole document, a comment will already be entered for you. You can leave this there, replace with a new comment or add your comment after this one.
- Version control: When you insert changes, if you mark them as "Minor Edit" when you submit them, you will not get a Revision History line for them here. If you put "vX.Y - " in front of them, you will get an entry in the Version column. If it is a ".0" version, its status is listed as "Issued". If it's not 0 after the point, its status is listed as "Draft".
- When a document is going to be changed to a new version, you **must** change the version and date within the document, and add the version number to the start of the comment. For example:
    - v0.2 - draft issue for review
    - v1.0 - issued after review
- This results in a revision history table as follows:

{{#hop:}}

- A document should be checked that it exports to PDF correctly - in most cases, documents will export with no issues. However, it has been known that a document does not correctly format into PDF. If this is the case, the document should be referred to the Assist maintainer for checking. Documents can be exported to PDF from the left-hand toolbar.

1.3 Templates

- Where possible, the templates created for you should be used when creating and within the document.
    - Document templates have been produced for the following document types:
        - ◊ Requirements
        - ◊ Estimates
        - ◊ Functional Specifications
    - These can be accessed through this page.
    - The following templates have also been created for editing purposes:
        - ◊ Note - This provides a note graphic
          Note: like so
        - ◊ Warning - This provides a warning graphic
          Warning: like so
    - Generic Glossaries have been provided for the *CALIDUS* products. These can be added to if required by clicking on the glossary template in the editing screen.
    - Test Plan templates are available to construct test plan cycles - see the Functional Specification template for details on how these work.
    - A Comment template has been added to identify comments added to a reviewed document easily

    like so
    —User:Anw, *31/1/2012 16:33:36*

-
    - Buttons for all these and more have been added to the standard editing toolbar.

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1.4 Issuing Documents to a Client

- Documents should be issued in PDF form.
- The document title should follow the standard document template, with a version number, so:
    - EST 123456 CUSTREF Title v1.0.pdf
- Whilst the Assist system is being adopted, these documents should be held in the standard development or project document folder - please consult your project or product documentation for details.

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