

Assist - General Usage

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1 Assist - General Usage

This page is intended to show the available functions and benefits of using an Assist system for documentation.

1.1 What is Assist?

Assist is a Wiki, first and foremost.

Each Assist instance contains information, guides, documents and FAQs on the product for which it is intended, plus links to any other product Assist instances that may be relevant.

Assist is **product** documentation and guides, as opposed to specific customer usage guides. All customer-specific functionality has been referenced and documented as part of the product. Customer-specific Usage guides are generally the responsibility of the customer to produce, based on the provided product documentation and the solution design document and Statement of Work.

Should any customer wish for their specific documentation to be hosted within Assist, Apteau will review on a case-by-case basis and add as appropriate, so long as specific permission is given for this documentation to be available for all customers.

At this moment, no customer-specific instances of Calidus Assist exist.

1.2 What does Assist Provide?

Internally and externally, Assist provides:

- Web-accessible help direct to customers.
- Web-accessible help per page, which can be linked to from our applications.
 - ◆ [Assist Help Config in Other Systems](#)
- Ability to download any guide in Apteau formatted PDF document.
- Faster, more accurate and appropriate searching of functionality (compared to hosted documents).
- Historical access to previous versions of pages and images.
- Image repository - View and download any file.

Internally, Assist also provides:

- A central hub of ideas, technical assistance guides, release notes and other internal documentation, to aid in sharing.
- Reusable screen shots and screen descriptions.
- Categorization of pages together, both for navigation purposes and producing documents from the categories.
- Transclusion - the text from any page can be pulled directly into any other page through transclusion. This promotes "write once, write everywhere" sensibilities and reduces duplication of effort and increases the likelihood that all pages are up to date with the latest functionality.
- Templates - promoting a similar look and feel to all documents, templates can be used to ensure that documents look like Apteau documents, that warnings and informational noted look the same, etc. This improves readability for the end users.
- Assistance creating new pages using templates
 - ◆ [Help:CreateNewPage](#)
 - ◆ [Creating an ER](#)

1.3 Features

- Technical
 - ◆ Latest security patched Apache, MariaDB and PHP installations.
 - ◆ Latest security patched MediaWiki installations.
 - ◆ Enhanced security of edits through CAPTCHA.
- Maintenance



- ◆ Easy upgrade path in the future to maintained LTS MediaWiki releases.
- ◆ Batch Editing/Replacement - through Extension:Nuke/Extension:ReplaceText
 - ◇ [Assist Global Replace](#)
- ◆ Code syntax and error highlighting - through Extension:CodeEditor/Extension:SyntaxHighlight
- ◆ Email/2FA account registration
- ◆ Easier page/document creation - through Extension:InputBox
- ◆ Batch upload of images, easing creation of new pages - through Extension:SimpleBatchUpload.
 - ◇ [Assist Editing Guide](#)
- QoL
 - ◆ Improved editor
 - ◇ [Assist Editing Guide](#)
 - ◇ On-line preview - through Extension:WikiEditor
 - ◇ Template inserting - through Extension:TemplateWizard and Extension:TemplateData
 - ◇ Visual Editor - through Extension:VisualEditor and Extension:Gadgets
 - ◇ Visual Differences in edits and history - through Extension:VisualEditor
 - ◆ Easier category navigation - through Extension:CategoryTree
 - ◆ Clean, modern layout, compatible with Mobile - through Timeless/Vector skin
 - ◆ Searching of tables - through bespoke code
 - ◇ [#Searching](#)
 - ◆ Exporting to PDF in Apteian format- through Extension:PdfBook
 - ◇ [#Printing and Exporting](#)
 - ◆ Online translation of pages to multiple languages - through Extension:GoogleTranslator
 - ◇ [#Translation](#)
 - ◆ "Peek" at linked pages by hovering over the link. Includes an appropriate thumbnail picture if there is one - through Extension:Popups

Note that all extensions mentioned above are properly attributed to their authors, visible through the Assist's special page "Special:Version". See section [Special Pages](#) below.

1.4 Accessing the Systems

Assists are accessed through a globally-available link <https://calidusassist.adcservices.apteancloud.com/calidus-assist/{system}>, such as:

<https://calidusassist.adcservices.apteancloud.com/calidus-assist/OBS> - this Calidus HUB.

There is a landing page available with links to each Assist here:

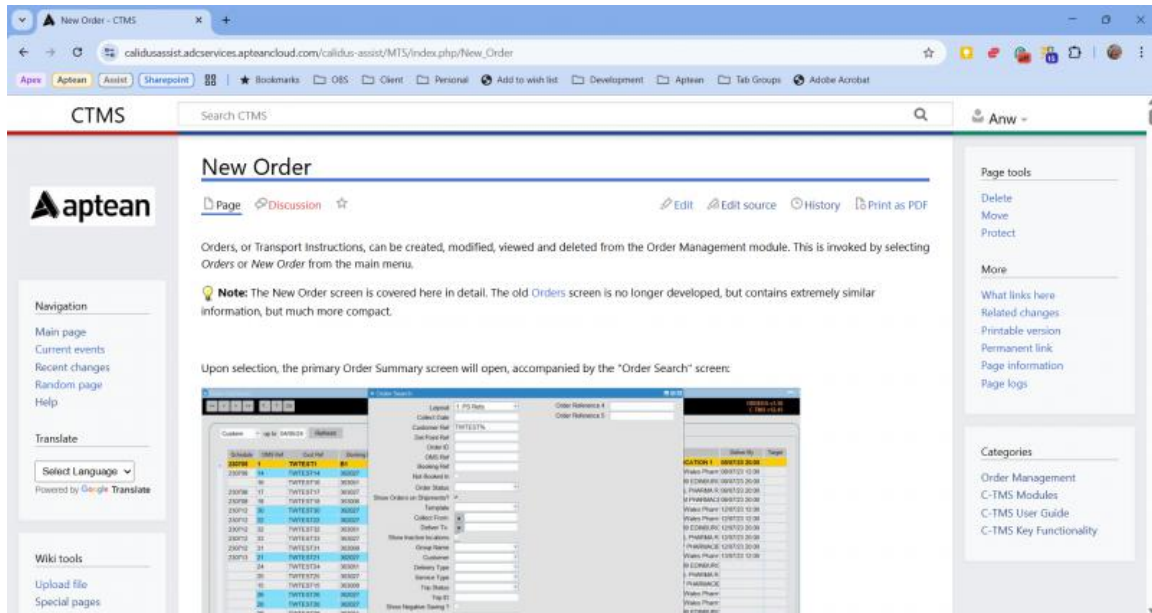
<https://calidusassist.adcservices.apteancloud.com/calidus-assist/>

The available systems are:

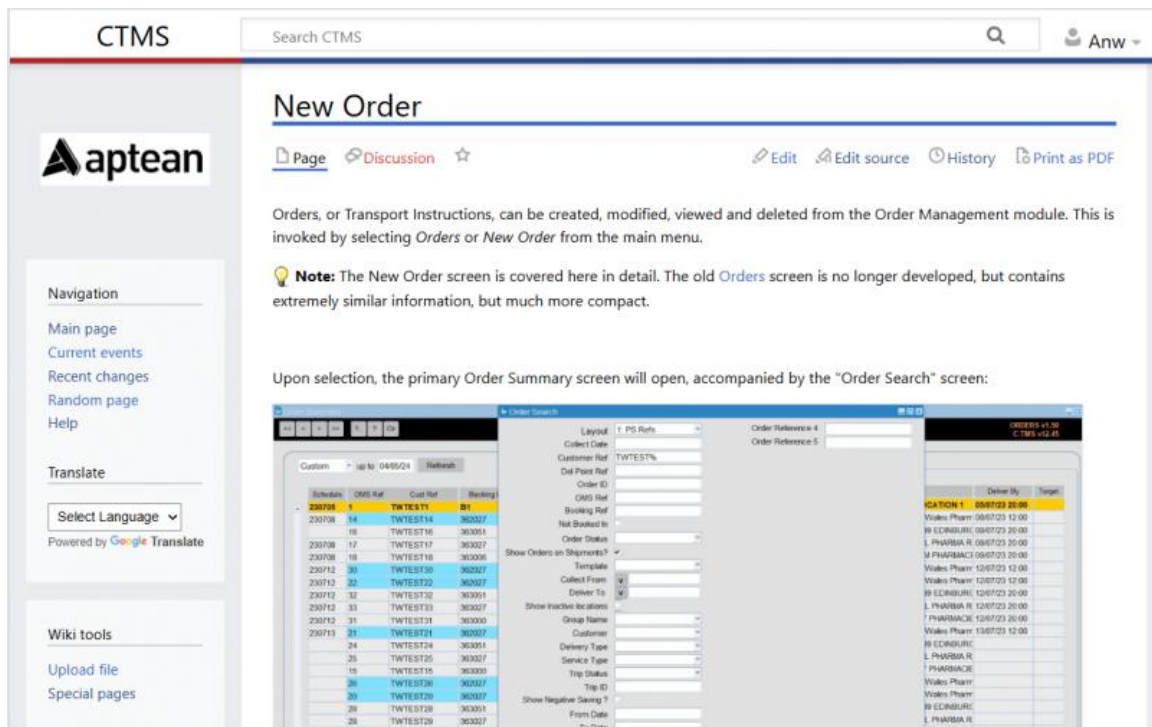
- CALIDUS TMS
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS>
- CALIDUS Total Logistics TMS
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/CTL-TMS>
- CALIDUS ePOD
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/EPOD>
- CALIDUS Portal
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/Portal>
- CALIDUS Vision (V1)
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/Vision>
- CALIDUS WCS
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/WCS>
- CALIDUS WMS,
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/WMS>
- CALIDUS MCS
 - ◆ <https://calidusassist.adcservices.apteancloud.com/calidus-assist/MCS>

You can access the systems through any internet connected device - the layout by default conforms to the best use of your screen size, for example:





Browser UI

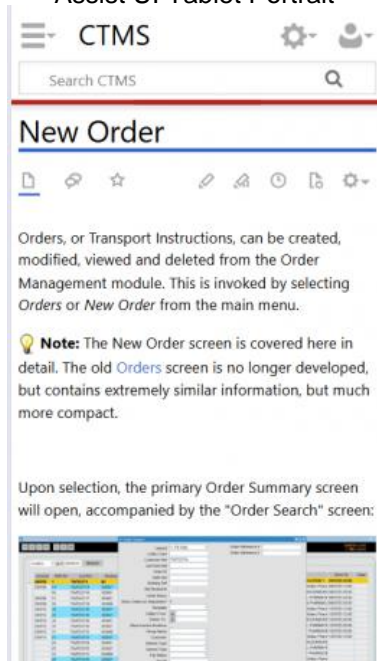


Assist UI Tablet Landscape



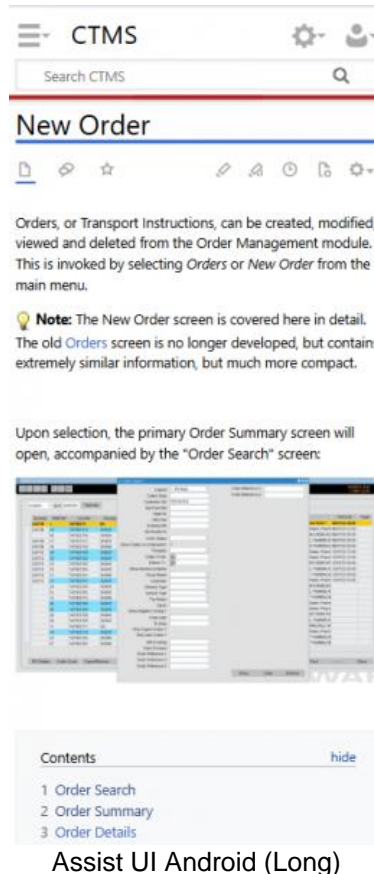


Assist UI Tablet Portrait



Assist UI iPhone





Assist UI Android (Long)

1.5 Logging In

You don't need to log in to view pages on Assist, only if you want to edit them.

If you do, click the *Anonymous* drop-down on the title, where you have the option to log in.

If you've forgotten your password, you can reset it here using your username or your email - this will only work if your email is associated to your user.

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.

If this is your first time logging on, your preferences should be set up automatically and should not need changing.

However, the following is a brief guide to what should be set and how to get to them:

Click your user name in the header

Select *Preferences* - you will be taken to the main preferences page.

- *User Profile* tab:
 - ◆ *Email options*:
 - ◇ Email should be set to your Aptean email - if not, contact the maintainers.
 - ◇ Checked - Allow other users to email me.
 - ◇ Checked - Allow emails from brand-new users.
 - ◇ Unchecked - Send me copies of emails I send to other users.
 - ◇ Checked - Email me when a page or a file on my watchlist has changed.
 - ◇ Checked - Email me when my user talk page has changed.
 - ◇ Unchecked - Email me also for minor edits of pages and files.
- *Appearance* tab:
 - ◆ Skin - set to Timeless.
 - ◆ Skin preferences - all ticked.
 - ◆ Reading preferences - all ticked.



- *Editing* tab:
 - ◆ Unchecked - Mark all edits as minor by default.
 - ◆ Checked - Prompt me when entering a blank edit summary (or the default undo summary).
 - ◆ Checked - Warn me when I leave an edit page with unsaved changes.
 - ◆ Unchecked - Temporarily disable the visual editor while it is in beta.
 - ◆ Checked - Enable the editing toolbar.
- *Watchlist* tab:
 - ◆ Everything unchecked except Expand Watchlist.
- *Gadgets* tab:
 - ◆ Everything checked.

1.6 Reading

Each page is typically linked to from lots of different areas:

- From the main page you will generally find links to everything in the system.
- You can search for pages using the search bar - see [Searching](#) below.
- You can browse pages through categories - see [Categories](#) below.
- Through lists of pages on categories - see [Special Pages](#) below.
- You can move to other pages through embedded links on a page.

When there is a link to another page, you can hover your mouse over it and the system will display a quick summary and an image to give you a flavour of the content before you click it. Not all links can display like this, but most do, and it's useful to get a preview of the contents of a link before you click into it.


1.7 Contacting other users

You can contact other users, including the admin of the system, using the user's talk pages.

You might find a user through page change history or through the users list. Once you click on the user, you will be taken to their personal page.

You can add to a user's talk page by clicking on their name and clicking the Discussion tab. They will be notified through email that their page has been edited.

You can email a user directly from user's page, using the *Page Tools* section, *Email this user*.

 **Note:** You can only do this when you are logged in!

1.8 Searching

Although all pages from your *CALIDUS* system link directly to the appropriate page in this *CALIDUS* Assist guide, you can search for help on anything in the system using the search bar. It depends on how you have *CALIDUS* Assist configured, but this search bar is normally either in the title at the top of the screen or in the toolbar on the left.

Did you know that you can activate this search at any time using a shortcut key combination? Hover over the Search bar now and you will see it tells you the hot-key combination, typically ALT-F or ALT-SHIFT-F. Hitting those keys together will activate the search box and you can type in what you're looking for. Be aware that these shortcuts are dependent on the browser that you are using, so check for compatibility first.

If you know the name of the page, just type it there and click the **Go** button. If you want to search for any text in the page, click the **Search** button instead, or just hit enter for *CALIDUS* Assist to do it for you. Typically, as you type, the search bar will quickly offer you some matches that might be what you're looking for - if it is, just click the suggestion and Assist will take you there.

Some tips on searching:

- If you enter multiple words (like "fixed drop scheduling") without quotes, the search routine will find you pages that match any of the words, but ordered in the most likely order (i.e. with most matches of most words)
- If there is a page called "fixed drop scheduling", you will be taken straight to it.
- If you enter your search with quotes i.e. "fixed drop scheduling", it will find that specific phrase in the pages, rather than any of the words.



- If you enter plus instead of space i.e. fixed+drop+scheduling, you will only get pages in the results that have all 3 words in them, anywhere in the page, in any order.
- You can also control partial word matching with an asterisk. So let's say you are searching for a parameter called AUTO_SCHED something-or-other. Searching for AUTO_SCHED will not bring back any results, as there are no full words or phrases like that. But if you enter AUTO_SCHED_* instead, it will search for words *starting with* "AUTO_SCHED" and bring you back some matches.

1.9 Searching Tables

A lot of the pages have tables of data on them - this can be a bit difficult to see what you're after. So, in the cases where there is a large amount of data in tables, we have made the tables searchable.

On top of the table will be a *Search* entry box. Type in what you're looking for and the table will be filtered to show all of the matching rows - that is, rows where any column contains that text at all, anywhere. This filters as you type.

Note that some data will be always be shown, like headers, or rows that the writers of the page have decided must always be shown.

You can clear the text out of the *Search* box and this will display everything again - do this by either deleting it or use the provided clear (X) button to the right of the *Search* box.

Have a go below - maybe try entering "ap", then "app", or enter "fruit" and see the way it works.


Fruit	Some Text - this header row is always shown
Apple	Green apples
Orange	Not an apple
Pineapple	Also not
Grapefruit	Very big!
Banana	I like bananas, so I'm always going to show them
Kumquat	Interesting fruit
Grape	Small fruit
Tomato	Is this a fruit or a vegetable?

1.10 Categories

Pages are typically categorised into groups, either for commonality or in a lot of cases so you can print all of the pages as a PDF book.

From a page, you can see categories in the Categories list and click on them to see all pages in that category.

You can also see all categories from the Categories or Category Tree [special pages](#).

 **Note:** Category editing is a DARK ART but necessary - see the [Assist Editing Guide](#) for more details.

1.11 Image Repository

The Wiki acts as an image repository for all. This is especially useful to sales teams both internal and external, as images can be clicked, zoomed in and downloaded for your own use.

1.12 Historical Version Access

Wikis always keep a history of all changes made to a page, along with a commentary as to why this change was made. You can access this with the History tool. This allows you to see previous versions, check the authors, query with the correct people, etc, which ensures much more accurate documentation.

Note that you can also access historical versions of images when clicking the image. You can view and download these historical versions.

1.13 Seeing Links

Beyond just categories that have been set by the authors, you can also see what links to a particular page (and therefore more related information about that page) by clicking the *What Links Here* page tool.



This will show you all the times the page is used and what a page uses. Some definitions:

- *Links* - the listed page has a link that you can follow to this page.
- *Redirect* - a page with a different name forwards directly to this page. This could be another title to the page, or a screen ID.
- *Transclusion* - the page in question includes all of the text on this directly in itself. Any change to this transcluded page will reflect in the other page.

You can also click the *Page Information* tool to see what this page uses itself (i.e. pages that this page transcludes).

You can see both what links from and to, in transcluded by and transcludes this page and the history of changes to each of the related pages by using the *Related Changes* tool.

1.14 Special Pages

You can access a lot of special pages from the *Wiki Tools/Special Pages* menu. Of interest are:

- Lists of pages
 - ◆ All pages - see and search the titles of all pages.
 - ◆ Categories - see and search the titles of all categories.
 - ◆ Category tree - see and browse through a tree of all categories.
 - ◆ Search - search for pages or content, with many more advanced features than the simple search bar at the top of the page.
- Users and rights
 - ◆ Active users list - any active users.
 - ◆ Change or remove email address
 - ◆ Preferences
 - ◆ Reset password
 - ◆ User contributions - showing edits by specified users.
 - ◆ User list - a list of all users on the system.
- Recent changes and logs
 - ◆ Gallery of new files
 - ◆ New pages
 - ◆ Recent changes
 - ◆ Watchlist - your watchlist of pages.
- Media reports and uploads
 - ◆ File list - a searchable list of all media (images etc)
- Data and tools
 - ◆ Version - system component versions and software attributions

1.15 Translation

Aptean do not maintain translated Assist help pages. However, the toolbox contains a link to Google Translate to translate the page into a language of your choice. Select the language from the drop-down list, and Google will translate the whole page for you.

You can remove the translation by closing the Translate toolbar at the top of the screen.

1.16 Printing and Exporting

You can export pages from *CALIDUS* Assist using the *Print as PDF* or *Download as PDF* link. Where this appears depends on the style the Assist is configured with, but by default this link will be in the *Toolbox* menu on the left of the screen, or on the tabs at the top right of the screen.

You can export categories as a full document in the same way - all pages in that category will be included in the PDF in the order in which they are listed in the category.

We've typically also included a link in the description of categories where this will export as a document, and we also add the **DOC** button next to documents that you can download from the first page of Assist.

