



Aptean

C-Assist User Guide

CALIDUS Assist

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Contents

1 Assist - Patrolling edits.....	1
1.1 Reference.....	1
1.2 Configuration.....	1
1.3 Patrolling.....	1
2 Assist API.....	3
2.1 What is it?.....	3
2.2 How do I use it?.....	3
2.3 Examples.....	3
2.4 Creating an XSL.....	4
3 Assist Clean Up Vertopal Macro.....	6
3.1 Instructions.....	6
3.2 Usage.....	6
3.3 Macro.....	6
4 Assist Cleanup Macro.....	8
4.1 Instructions.....	8
4.2 Usage.....	8
4.3 Macro.....	8
5 Assist Converting Documents into MediaWiki Format.....	10
5.1 Tools.....	10
5.2 Manual Process.....	10
5.3 Process using On-line Converter.....	11
5.4 Process using AI/Manual.....	12
6 Assist Editing Guide.....	15
6.1 General.....	15
6.2 Document Editing.....	15
6.3 Source Editing.....	15
6.4 Visual Editing.....	16
6.5 Standards.....	17
6.6 Images.....	18
6.7 Templates.....	20
6.8 Transcluding.....	21
6.9 Interwiki.....	22
6.10 Categories.....	22
6.11 Saving your Changes.....	24
6.12 Some Final Notes.....	25
6.13 Issuing Documents to a Client.....	25
7 Assist Global Replace.....	26
8 Assist Help Config in Other Systems.....	27
8.1 CTMS.....	27
8.2 EPOD.....	27
8.3 CTL.....	27
8.4 WMS.....	27
8.5 Bay Diary.....	28
8.6 TCM.....	28
8.7 TOC.....	28
8.8 Portal.....	28
9 Assist PDF Production Code.....	29
9.1 Extension:PDFBook.....	29
9.2 Versions of the extension.....	29
9.3 Enabling the extension.....	29
9.4 Structure of code.....	30
9.5 Support.....	31

Contents

10 Assist Support Guide.....	33
10.1 Requirements.....	33
10.2 Hosted Systems.....	33
10.3 Updating Data En Mass.....	33
10.4 Viewing BLOB fields.....	33
10.5 Recovering passwords from MYSQL Workbench.....	33
10.6 Common Queries.....	34
10.7 Assist Database Backup.....	34
10.8 Assist Database Restore.....	35
10.9 Upgrading a Wiki from 1.16 Upwards.....	35
10.10 Creating a Brand New Wiki.....	36
10.11 Extracting Hacks.....	36
10.12 Extracting Templates.....	37
10.13 Extracting Common Additional Files.....	37
10.14 Extracting Namespace Files.....	37
10.15 Importing Additional Files, Templates and Hacks into a Wiki.....	38
10.16 Importing Namespace Files.....	38
10.17 Additional Actions.....	38
10.18 MediaWiki.....	39
10.19 Common Maintenance Actions.....	39
10.20 Support Issues.....	42
11 Assist Upgrade Actions.....	44
11.1 Purpose.....	44
11.2 Local Upgrades.....	44
11.3 Fresh Server Installation.....	44
11.4 Upgrading XAMPP PHP.....	46
11.5 Creating a brand new MediaWiki installation.....	46
11.6 Shared Interwiki.....	46
11.7 Upgrading existing MediaWiki.....	47
11.8 Additional Actions.....	51
12 Assist Visual Editor Gadgets.....	53
12.1 Resources.....	53
12.2 Examples.....	53
13 Help:CreateNewPage.....	60
13.1 New Pages.....	60
13.2 Patches/Release Notes.....	60
13.3 Specific Document Types.....	61
13.4 Category Utility Pages.....	62
14 Help:CreateNewWiki.....	63
14.1 Initial Setup.....	63
14.2 Configuration.....	63
14.3 Further Configuration.....	63
14.4 Creating the basic content.....	65
14.5 Creating Users.....	67
15 Creating a General Release Note.....	68
15.1 Overview.....	68
15.2 Creating a new Release Note.....	68
16 Creating a WCS Patch.....	72
16.1 Creating a new WCS PATCH.....	72
17 Creating an ER.....	75
17.1 Creating a new ER.....	75
18 Creating Release Notes.....	77
18.1 Overview.....	77
18.2 Creating Release Notes.....	77

Contents

19 Did You Know.....	79
19.1 CALIDUS CTMS.....	79
19.2 CALIDUS Assist.....	79
20 Help:PDF Book.....	81
20.1 Single Page.....	81
20.2 Creation of a Book.....	81
20.3 Production of the PDF.....	81
20.4 Setup Requirements.....	81
21 Process - Estimate Document.....	82
21.1 Pre-Requirements.....	82
21.2 Process.....	82
21.3 Creating an EST.....	82
21.4 Using the EST Word Template.....	82
21.5 Using Assist Calidus Hub to create an EST.....	82
21.6 General Notes.....	83
22 Process - Functional Specification.....	84
22.1 Pre-Requirements.....	84
22.2 Process.....	84
22.3 Creating an FS.....	84
22.4 Using the FS Word Template.....	84
22.5 Using Assist Calidus Hub to create an FS.....	85
22.6 General Notes.....	85
23 Process - Updating Documentation.....	86
23.1 When should documentation be updated?.....	86
23.2 Who should update documentation?.....	86
23.3 What should be documented or updated?.....	86
23.4 How much is this going to help?.....	89
24 Creating articles for inclusion in a PDF Book.....	90
24.1 Single Page.....	90
24.2 Creation of a Book.....	90
24.3 Production of the PDF.....	90
24.4 Setup Requirements.....	90
25 Creating new documents from templates.....	91
26 Creating a new Wiki installation.....	92
26.1 Initial Setup.....	92
26.2 Configuration.....	92
26.3 Further Configuration.....	92
26.4 Creating the basic content.....	94
26.5 Creating Users.....	96
27 Upgrading the version of an existing Wiki installation.....	97
27.1 Software Required.....	97
27.2 Prior to Upgrade.....	97
27.3 Upgrade.....	97
28 Editing a document.....	98
28.1 General.....	98
28.2 Document Editing.....	98
28.3 Source Editing.....	98
28.4 Visual Editing.....	99
28.5 Standards.....	100
28.6 Images.....	101
28.7 Templates.....	103
28.8 Transcluding.....	104
28.9 Interwiki.....	105

Contents

28 Editing a document	
28.10 Categories.....	105
28.11 Saving your Changes.....	107
28.12 Some Final Notes.....	108
28.13 Issuing Documents to a Client.....	108
29 Support Tools.....	109
29.1 Requirements.....	109
29.2 Hosted Systems.....	109
29.3 Updating Data En Mass.....	109
29.4 Viewing BLOB fields.....	109
29.5 Recovering passwords from MYSQL Workbench.....	109
29.6 Common Queries.....	110
29.7 Assist Database Backup.....	110
29.8 Assist Database Restore.....	111
29.9 Upgrading a Wiki from 1.16 Upwards.....	111
29.10 Creating a Brand New Wiki.....	112
29.11 Extracting Hacks.....	112
29.12 Extracting Templates.....	113
29.13 Extracting Common Additional Files.....	113
29.14 Extracting Namespace Files.....	113
29.15 Importing Additional Files, Templates and Hacks into a Wiki.....	114
29.16 Importing Namespace Files.....	114
29.17 Additional Actions.....	114
29.18 MediaWiki.....	115
29.19 Common Maintenance Actions.....	115
29.20 Support Issues.....	118
30 Appendix A: Document History.....	120
31 Help:UpgradeWiki.....	121
31.1 Software Required.....	121
31.2 Prior to Upgrade.....	121
31.3 Upgrade.....	121

1 Assist - Patrolling edits

It's important that the quality of pages in Assist is high, and we reuse where possible.

Therefore, every edit made by users who are not system administrators are logged and marked as unpatrolled edits.

That allows administrators of Assist to patrol edits to ensure quality and prevent spamming.

Currently this is a manual process, but many elements will be automated with time.

1.1 Reference

https://www.mediawiki.org/wiki/Help:Patrolled_edits

1.2 Configuration

All administrators are naturally granted the autopatrol right (none of their edits require patrolling) and the patrol right (the ability to patrol unpatrolled edits).

Administrators can assign other users to the administrator group, to increase the number of users patrolling changes.

Administrators can add the patrol right to individual users.

The system has been configured to email selected administrators with details of all changes, so that they can be patrolled. To change or remove this:

- Edit `/path/to/Assist/LocalSettingsAdditional.php`
- Change `$wgUsersNotifiedOnAllChanges` with the users to be notified, as an array e.g. `['uid1', 'uid2']`.

As a (better) alternative to this email notification, consider the use of <https://feeder.co/reader> instead. You can set up a basic free account (or use without an account).

- Go to your Assist of choice.
- Click Recent Changes
- Make sure settings are low, say 300 changes in recent day or hours.
- Click "Atom" in the Wiki Tools toolbar
- Chrome should open a page allowing you to follow the feed. Choose *Feeder* and click **Follow**.
- This should then be added to your Feeder list.

You will then receive a Chrome notification whenever a page is updated (usually within 10 minutes).

You can click on the link to be shown the page directly in Feeder, where you can see the changes made.

Consider also adding this as an extension to Chrome - the extension is called "RSS Feed Reader", search for this or "Feeder" in the [Chrome Web Store](#)

1.3 Patrolling

To mark an edit as patrolled

- Access `Special:RecentChanges`
- Changes which are not patrolled display with a red exclamation mark (!).
- Click the (diff) link next to an edit.
- To mark the edit as patrolled, click the Mark as patrolled link.

To mark a new page as patrolled

- Access `Special:NewPages`
- New pages which are not patrolled display with a yellow background.
- To mark a new page as patrolled, visit it and click the `?markaspatrolledlink?` link near the bottom of the page.

To mark a new file as patrolled



- Access Special:NewFiles
- If you want to see only unpatrolled files, check "Hide patrolled uploads"
- To mark a new file or new file version as patrolled, visit it and click the [?markaspatrolledlink?](#) link near the bottom of the file description.

 **Note:** You can't mark a deleted file or page as patrolled.



2 Assist API

2.1 What is it?

The API is a method of extracting data from Assist for your own use.

In general, any text will be in MediaWiki format.

The API is also useful for extracting stats.

2.2 How do I use it?

You can build and execute an API query graphically from the [Special:ApiSandbox](#) special page.

You can also directly type into the URL box on your browser.

Help is available through the standard MediaWiki pages.

- [mw:Help:ApiSandbox](#) - a brief description of how to use the sandbox.
- [mw:API:Action_API](#) - a full description of what methods and properties are available in the MediaWiki API.

2.3 Examples

The example we will look at are varieties of querying the Assist data for recent changes in a number of different ways.

2.3.1 Using the Sandbox

- Go to the special page.
- Select the "action", in this case "query".
- Select the "format", in this case "xml".
 - ◆ If you choose format XML, you can style the results. If your mediawiki contains an XSL you can use it as follows:
 - ◇ Click "Format=xml" link on the left.
 - ◇ Enter the XSL. In this case, for Calidus Hub, for Recent Changes, use "MediaWiki:RC.xsl". This will format the results to HTML.
- Click on the "action=query" link on the left.
- Select "list" = what the query is to list - in this case "recentchanges".
- Click on the "list=recentchanges" link on the left.
- Check "rcstart" and enter the start date. Note that this is a history, so this start date is the time you wish to start LOOKING BACK from. e.g. today's date.
- Optionally check "rcend" and enter the end date. Note that if the range is too wide, then this will not produce results. Instead rely on "rclimit" below.
- Include or exclude users:
 - ◆ Enter "rcexcludeuser" for the user you wish to exclude.
 - ◆ Alternatively, enter "rcuser" for the user you wish to include
- Check "rcprop" and enter the properties you want to report. This will default - you can remove and add and change the order of properties. In this case: user, title, timestamp.
- Enter rclimit. "MAX" or "5000"
- Scroll to the top and click **Make Request**.

The browser will show you a preview the results. For plain json or XML, you can copy the results. Or you can copy the link and paste into your browser for formatted results (especially if you have used an XSL).



2.3.2 Using a Browser

Simply type in your Assist core URL, followed by `api.php`, followed by your querystring.

Description:

- Core wiki URL e.g. "https://calidusassist.adcservices.apteancloud.com/calidus-assist/OBS/"
- Add `api.php`
- Start the querystring - "?". Each additional parameter after the first requires an ampersand "&"
- "action" - the action you wish to perform, in this case a "query".
- "format" - the format of the response. Choose "json" or "xml".
 - ◆ If you choose format XML, you can style the results. If your mediawiki contains an XSL you can use it as follows:
 - ◇ "xslt". For Calidus Hub, for Recent Changes, use "MediaWiki:RC.xsl". This will format the results to HTML.
- "list" - what you want the query to list, in this case "recentchanges"
- "rcstart" - enter the start date. Note that this is a history, so this start date is the time you wish to start LOOKING BACK from. e.g. today's date.
- "rcend" - Optional, enter the end date. Note that if the range is too wide, then this will not produce results. Instead rely on "rclimit" below.
- "rcexcludeuser" - for the user you wish to exclude.
- "rcprop" - enter the properties you want to report. In this case: "user, title, timestamp".
- "rclimit" - "MAX" or "5000"

As values:

- https://calidusassist.adcservices.apteancloud.com/calidus-assist/OBS/
- `api.php`
- ?
- `action=query`
- `&format=xml`
 - ◆ If you choose format XML, you can style the results. If your mediawiki contains an XSL you can use it as follows:
 - ◆ Optional: `&xslt=MediaWiki%3ARC.xsl`
- `&list=recentchanges`
- `&rcstart=2025-10-01T09%3A54%3A58.000Z`
 - ◆ Optional: `&rcend=2025-01-01T09%3A54%3A58.000Z`
- `&rcexcludeuser=anw`
- `&rcprop=user%7Ctitle%7Ctimestamp`
- `&rclimit=max`

Sample link:

- [\[API Request\]](#)

2.4 Creating an XSL

If you export in XML format, you have the option of specifying an XSL (stylesheet). Simply put, this can format the page as a proper web page, which is much easier to read and print.

To do this:

- Create a page called `/MediaWiki:(whateveryouwant).xsl` - add this to the base URL of your Assist e.g. `https://calidusassist.adcservices.apteancloud.com/calidus-assist/OBS/index.php?title=MediaWiki:MyXSL.xsl`
- Create the XSL and save.
- Add this to your export options (as shown above)



2.4.1 Sample XSL

The following works for recent changes exports. It will work regardless of how many or which columns you select to report, and format the result as a simple table. Simple styling has been added.

```
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:output method="html" indent="yes"/>

  <xsl:template match="api/query/recentchanges">
    <html>
      <head>
        <style>
          body {
            font-family: 'Segoe UI', 'Segoe UI Emoji', 'Segoe UI Symbol', 'Lato', 'Liberation Sans', 'Noto
            margin: 0;
            padding: 0;
          }
          table {
            border-collapse: collapse;
          }
          table thead tr {
            background-color: grey;
            color: white;
          }
          table tbody tr {
            vertical-align: top;
          }
        </style>
      </head>
      <body>
        <h2>Recent Changes</h2>
        <table border="1">
          <thead>
            <tr>
              <xsl:for-each select="rc[1]/@*">
                <th><xsl:value-of select="name()"/></th>
              </xsl:for-each>
            </tr>
          </thead>
          <tbody>
            <xsl:for-each select="rc">
              <tr>
                <xsl:for-each select="@*">
                  <td><xsl:value-of select="."/></td>
                </xsl:for-each>
              </tr>
            </xsl:for-each>
          </tbody>
        </table>
      </body>
    </html>
  </xsl:template>
</xsl:stylesheet>
```



3 Assist Clean Up Vertopal Macro

Assist requires MediWiki format, and there is an automated conversion called Vertopal. This leaves some undesirable formatting from the Vertopal conversion.

A macro exists within Notepad++ (q.v. npp).

The Macro replaces the undesirable formatting.

3.1 Instructions

Download and install npp.

On a notepad++ default installation, your macros will be stored at %AppData%\Notepad++ in a file called shortcuts.xml.

For example:

C:\Users\youruser\AppData\Roaming\Notepad++

You can edit the macro in npp but changes will not affect until after you save and restart npp.

- Open the macro file above
- Paste in the macro under any existing macros in the <Macros> section, before the final </Macros> tag.
- Save
- Restart npp.
- In Macro menu, there should now be a macro "Assist Clean Up Vertopal"

3.2 Usage

Simply run the macro against converted or pasted in Word documents - this will replace all troublesome characters and also replace up to 3 levels of bulleted lists.

- Macro menu, "Clean Up Vertopal"
- Save

3.3 Macro

```
<Macro name="Clean Up Vertopal" Ctrl="no" Alt="no" Shift="no" Key="0">
  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="<span.*</span>" />
  <Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
  <Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
  <Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="\[[File\:vertopal_.*?/media/imag" />
  <Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
  <Action type="3" message="1602" wParam="0" lParam="0" sParam="\[[File\:SYS-DESC-" />
  <Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
  <Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="\.png\|.*?\]\]" />
  <Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
  <Action type="3" message="1602" wParam="0" lParam="0" sParam="\.png\|800px\]\]" />
  <Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
  <Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="</?blockquote>" />
```



```

<Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="<ol.*>\n<li>" />
<Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="\n" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="</li></ol>" />
<Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="= <br />\n" />
<Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="= " />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="\{\}\" />
<Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam='\{\}\" class="wikitable" border="1" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam='!width="\d*%"\' />
<Action type="3" message="1625" wParam="0" lParam="2" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="!" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />

</Macro>

```



4 Assist Cleanup Macro

Assist PDF production does not work well with certain extended characters, producing a question mark instead. These must be replaced.

A macro exists within Notepad++ (q.v. npp).

The Macro replaces Word smart characters (such as opening/closing single and double quotes, hyphens) with standard ASCII equivalents.

Also, if converting direct in notepad from Doc, bullet points do not work properly, so this macro replaces them as well.

4.1 Instructions

Download and install npp.

On a notepad++ default installation, your macros will be stored at %AppData%\Notepad++ in a file called shortcuts.xml.

For example:

C:\Users\youruser\AppData\Roaming\Notepad++

You can edit the macro in npp but changes will not affect until after you save and restart npp.

- Open the macro file above
- Paste in the macro under any existing macros in the <Macros> section, before the final </Macros> tag.
- Save
- Restart npp.
- In Macro menu, there should now be a macro "Assist Cleanup"

4.2 Usage

Simply run the macro against converted or pasted in Word documents - this will replace all troublesome characters and also replace up to 3 levels of bulleted lists.

- Macro menu, "Assist Cleanup"
- Save

4.3 Macro

```
<Macro name="Assist Cleanup" Ctrl="no" Alt="no" Shift="no" Key="0">
  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="?" />
  <Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
  <Action type="3" message="1602" wParam="0" lParam="0" sParam=' ' />
  <Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
  <Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="?" />
  <Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
  <Action type="3" message="1602" wParam="0" lParam="0" sParam=' ' />
  <Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
  <Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="-" />
  <Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
  <Action type="3" message="1602" wParam="0" lParam="0" sParam="-" />
  <Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
  <Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
  <Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="?" />
  <Action type="3" message="1601" wParam="0" lParam="0" sParam="?" />
```



```

<Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
<Action type="3" message="1700" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1601" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1625" wParam="0" lParam="1" sParam="" />
<Action type="3" message="1602" wParam="0" lParam="0" sParam="" />
<Action type="3" message="1702" wParam="0" lParam="768" sParam="" />
<Action type="3" message="1701" wParam="0" lParam="1609" sParam="" />
</Macro>

```



5 Assist Converting Documents into MediaWiki Format

This guide is intended to show the processes that can be followed to convert a document (DOCX by preference) into an Assist page.

There are multiple methods and processes, including some not documented here, such as using LibreOffice or a Word extension, neither having produced reasonable results or time savings.

The processes below will automate vast tracts of the process and make the conversion of documents much easier and less time consuming.

5.1 Tools

Recommended initial editing tool - NOTEPAD++

- <https://notepad-plus-plus.org/downloads/>

Create Macro - Assist Cleanup

- See documentation - [Assist Cleanup Macro](#)

Create Macro - Vertopal Cleanup

- See documentation - [Assist Clean Up Vertopal Macro](#)

Recommended - PowerToys

- <https://learn.microsoft.com/en-us/windows/powertoys/install>

AI

- Aurora/Direct ChatGPT
- Gemini

Online Conversion tool:

- <https://www.vertopal.com/en/convert/docx-to-wiki-mediawiki>

5.2 Manual Process

The Visual Editor will convert documents safely and reasonably in most cases, with the exception of images. For very long or image-heavy documents, the process below is recommended.

For manual conversion:

- You must be logged in.
- Copy the appropriate text from your document.
- Create a new page
 - ◆ For a blank page, easiest is to search for the title of the page you want to create in the Search bar, then click the red link to create the new page.
 - ◆ For a particular document type or template, use the templates provided on [Create a new page](#) from the home page. See the guides for this, but simply put:
 - ◇ Find the document type you want to create in the list
 - ◇ Enter a title - follow the guidelines shown.
 - ◇ Click the button - the page will be started for you with the appropriate templates (headers, footers, etc) all created for you and with sample headings ready to be entered.
 - ◇ **Note:** Word automatically converts quotes and hyphens to "smart" quotes and dashes. These do not print well in PDF. You should consider using Find/Replace to remove/replace these.
- For each image in the document
 - ◆ see if there is an appropriate image for that screen that you can already use search for pages on that screen and reuse if you can
 - ◆ If not, copy the image, then paste into the Visual Editor. See the user guide for more details on this process, but simply put



- ◇ Upload the file
- ◇ Name the file appropriately so it can be found later - say, after the document, or the screen being documented.
- ◇ Make it a basic image, no larger than 800px.
- ◇ You can centre using the Paragraph drop-down in the toolbar.
- Categorize your page - see the user guide for more details, but simply:
 - ◇ Choose Categories from the hamburger menu in the editor bar.
 - ◇ Start typing your categories and add them.

5.3 Process using On-line Converter

Convert document using Vertopal online conversion tool

- <https://www.vertopal.com/en/convert/docx-to-wiki-mediawiki>

Use DOC/DOCx - PDF doesn't work very well.

NOTE: This does not convert embedded objects like excel, attachments, Visio or Word diagrams. If your document contains these, then save these as PNG images to add to the document later.

Download and Extract to subfolder


Rename and Edit wiki file

Run Macro - Assist Cleanup

Run Macro - Clean Up Vertopal

Essentially this does the following:

```
<span.*</span> with nothing
\\[File\vertopal_392608dac46847cb99daf0bb8d5090ed/media/image with \\[File\TTM-
.png\|.??\]\] with .png\|800px\]\] (if mostly huge images) or .png\]\] (if mostly small images)
<\/?blockquote> with nothing
<ol.*>\n<li> with \n
</li></ol> with nothing
= <br />\n with "= " (without the quotes)
\{\| with \{\| class="wikitable" border="1"
!width="\d*%" \| with !
```

 **Note:** Replace in the above - this assumes replacing for a document for TTM - replace TTM- with the name of your Assist and doc being converted e.g. WMS-, PORTAL-TTM-ARCH-, EPOD-DEVICE-, CTLTMS-, etc

The Vertopal Cleanup macro will put in "SYS-DESC-", so replace that.

Go through and ensure images are named with a reasonable name

e.g. if in home section in TTM, change file from TTM-1.png to TTM-HOME-1.PNG

Check all images now have a name - search for File\:

Any inline icons, make size 16px - search for file\: and any that are within paragraphs will need manipulation

Put into Assist

Rename images - Recommend using PowerRename from PowerToys.

- Select all images to be renamed, then right-click and Select Rename with PowerRename.



- If from Vertopal, the images are in a media subdirectory, names as image1, image2, etc.
- Tick "User regular expressions"
- From name: image(.*)
- To name: SYS-DESC-\$1

Example:

- From name: image(.*)
- To name: TTM-WMS-\$1

Results

From	To
Image1	TTM-WMS-1
Image2	TTM-WMS-2
Image10	TTM-WMS-10
Image11	TTM-WMS-11
Image20a-text	TTM-WMS-20a-text

Note: If there is any media in funky formats (like WMF/WMV. Visio or other objects directly embedded), then these will need to be manually converted - use screenshots, paint, etc to achieve that. This is not covered in this guide.

When renamed, use the Upload Multiple Files Special page to upload the files in bulk:

- Go to Special pages
- Click Upload multiple files.
- Enter a description for the images (otherwise this will default to something useless).
- Drag your images to be uploaded to the appropriate place on the page.
- The images will upload automatically, showing the progress on the screen.
- If any images should fail, try re-uploading them - sometimes bulk uploading >40 images at a time will cause some issues.

If you are doing this manually instead, upload the images by clicking on the image in the document and then manually upload the correct "imageX" file using the numbers as guide.

Finally, check the sizes of all pictures - remove or add |800px if necessary.

5.4 Process using AI/Manual

This process does not use an on-line converter process, but instead leverages AI to do a lot of the conversion work for you (after you have trained it appropriately). This is slightly more long-winded than using an online converter, but is much quicker than typing, copying and pasting manually.

Steps:

Convert the text to MediaWiki format

- Open the document
- Get rid of titles and final appendices - these will be added later using templates.
- Break the text down into chunks - it's easier to work with smaller segments
- Ask your favoured AI to convert the text to MediaWiki format.
 - ◆ **Note:** These steps are proven working for the AI's listed.
 - ◆ E.g. Gemini process including prompts:
 - ◇ *Please convert this text to Mediawiki format.*
 - ◇ *Paste in text*
 - ◇ *Please remove the table of contents and the first page before that.*
 - ◇ *Please lose the DIV elements*
 - ◇ *The first heading is level 1, so please reflect that and reduce all other headings by 1 level*
 - ◇ *Please remove the numbering from the headings.*
 - ◇ *Please remove any smart quotes or dashes and replace with plain quotes and hyphens.*
 - ◇ *The text I pasted in had images. Can you identify where those images were and put a placeholder in there of `[[File:SYS-DESC.png|800px]]`*
 - ◇ *Can you make the placeholder count please? e.g. SYS-DESC-1.png, SYS-DESC-2.png, etc*
 - ◇ *Any A.# headings should be level 2. Same for B.#, C.#.*



- ◆ E.g. Aurora/ChatGPT including prompts:
 - ◇ *Please convert my text into mediawiki format*
 - ◇ *Paste in text*
 - ◇ *Please make sure there are two line breaks between each section*
 - ◇ *The first heading is level 1, so please reflect that and reduce all other headings by 1 level*
 - ◇ *Please remove any smart quotes or dashes and replace with plain quotes and hyphens.*
 - ◇ *The text I pasted in had images. Can you identify where those images were and put a placeholder in there of `[[File:SYS-DESC.png|800px]]`*
 - ◇ *Can you make the placeholder count please? e.g. `SYS-DESC-1.png`, `SYS-DESC-2.png`, etc*
 - ◆ More prompts may be required on your document to get the format right, such as numbered lists, tables etc. In my tests, these all converted well, but you may have other preferences. For example:
 - ◇ *Please add "apt-searchable" as a class to the wikitable*
 - ◇ *Please add width="100%" to the tables*
 - ◇ *Please add border="1" to the tables.*
 - ◆ Depending on your document, you may want to make the images start at a particular number. You can ask the AI, for example:
 - ◇ *Please start the image numbering from the last section*
 - ◇ *Please reset image placeholder numbering to 1*
 - ◇ *Please start image placeholder numbering at 3*
 - ◆ The AI may be limited to the amount of text that can be uploaded, or the amount of text that can be output. In the latter case, you may then be able to prompt the AI to give you the next section, piece by piece. E.g., for ChatGPT:
 - ◇ *Please now output the next section of the text, starting where you left off*
 - ◇ *Please continue*
 - ◆ The output may be formatted by the AI renderer (for example, numbered lists look bold and large, line breaks are missing. You can ask for the plain wikitext code as opposed to the rendered output.
 - ◇ *Please display the raw wikitext*
 - ◇ *Please put 3 backticks at the start of the output*
 - ◆ However, when you have trained your AI to give you the correct output, this should stick for further document conversions.
 - ◇ **Warning:** You WILL lose all of your training if you close down the chat with your AI, so keep it open to preserve your requests for formatting.
- Create a new page in Assist
 - Copy the converted text into your page, and continue until complete.

Extract Images/Media:

- Make a copy of your DOCX file and rename it to ZIP instead.
- Open the zip
- Go to word/media
- Copy all of the image files from here into folder.

Note: If there is any media in funky formats (like WMF/WMV. Visio or other objects directly embedded), then these will need to be manually converted - use screenshots, paint, etc to achieve that. This is not covered in this guide.

Rename Images:

Recommend using PowerRename from PowerToys.

- Select all images to be renamed, then right-click and Select Rename with PowerRename.
- If from Vertopal, the images are in a media subdirectory, names as image1, image2, etc.
- Tick "User regular expressions"
- From name: image(.*)
- To name: SYS-DESC-\$1

Upload Images

Use Assist batch upload to upload the images:

- Go to Special Pages
- Click Upload multiple files.
- Enter a description for the images (otherwise this will default to something useless).
- Drag your images to be uploaded to the appropriate place on the page.
- The images will upload automatically, showing the progress on the screen.



- If any images should fail, try re-uploading them - sometimes bulk uploading >40 images at a time will cause some issues.

Manual insertion of Images:

If you have not trained the AI to insert image placeholders as suggested above, you may need to manually insert images in the correct place in the document.

- You can use the VisualEditor copy and paste or upload.
- You can instead batch upload the images first.
- You can paste in `[[File:SYS-DESC-1.png|800px]]` for the first image, and then update as you go along.

Finally, check the sizes of all pictures - remove or add |800px if necessary.




6 Assist Editing Guide

6.1 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.

6.2 Document Editing

When you find a page that needs editing, you can do it in one of two ways:

- Source Editing - typing in plain text with WikiText markup language - not too complicated, but a bit of a barrier for new users. Click the *Edit Source* button to start source editing.  **Note:** Source editing is stored in the browser, but will not persist if you close the browser. That makes it easy to lose a lot of changes if you are editing in source editor. Visual Editor changes will persist - it will remember your last changes in the session (as long as the session is still there!). So it's a lot harder to lose your changes between sessions with Visual Editor (as well as being a lot easier to use). You should only use Source Editing for certain things (like manually making small changes, adding "noinclude" tags, making a table searchable, etc - these exceptions are all called out below).
- Visual Editing - like a simple version of your favourite document editing application. You can do most things (but not all) with Visual Editing. Click the *Edit* link against a page to start Visual Editing.

You can also flip between visual and source editing when you're in there, so don't worry if you clicked the wrong one.

This guide will show you how to do everything here in each of the editing methods, to help reduce those barriers and make documentation easier.

6.3 Source Editing

WikiText markup can seem daunting, but it's not meant to be. This guide won't try and describe everything that you can do with WikiText markup, but will describe how the tools can make it easier to do.

This section will introduce you to the source editing toolbar and some basic concepts.

When source editing you will have a toolbar for basic edits. So start typing, and when you want to format something, you can use the toolbar.

If I want something in **bold**, I click the **Bold Text** button - the WikiText markup will be put in the editing window for me, with the text in between the markup ready for editing.

The same is true for:

- *Italic text*
- Headings (level 2-5)
- Bulleted lists (like this one) or

1. Numbered list items like this one

- No Wiki formatting (turns off WikiText markup, hugely useful when writing a guide like this one!)
- New Line
- **Big text** or Small text
- ^{Superscript text} or _{Subscript text}
- Links to other pages, like [Did You Know](#).
- Code.
- "Noinclude" tags.

You can also highlight the text you want to format and then click the button - the editor will tag the text you highlighted.

You have a **Preview** button - this shows you what your WikiText changes look like in real formatting in near real time. You can't edit it there, but it's useful to see you're getting it right.



Other essential page formatting is more complicated:

Tables can be inserted easily enough using the **Table** button. Click the button, choose your number of columns and rows (and any properties of the table, like sortable) and click **Insert**. The editor will insert the table for you in shorthand, like below:

Caption text

Header text Header text Header text

Example Example Example

Example Example Example

Example Example Example

Then you can edit it. We typically do not use captions, so you could remove that line if you want. To change the cell content, simply change the text between the vertical bars (or exclamation points, if it's the header row).

Tables also support being searchable - it's not a property that is supported by the Table tool, so you have to edit it in yourself using the source editor.

- Add "apt-searchable" to the table class

```
{| class="wikitable apt-searchable"
```

- You can then make rows non-searchable by adding a class to the row "|-" element as follows:

```
|- class="non-searchable"
```

Images are covered in a following section.


6.4 Visual Editing

Visual editing formats the text like it would do on the final page (in most cases). It's almost completely invisible to you as an editor that in the background this is generating the WikiText markup for you, so makes it much easier. There are however some things that the Visual Editor can't do which source editing is very useful for.

This section will introduce you to the visual editing toolbar and some basic concepts.

When visual editing you will have a toolbar for basic edits. So start typing, and when you want to format something, you can use the toolbar or the provided shortcuts.

If I want something in **bold**, I click the **Style Text** button and choose *Bold* or press `CTRL-B` - the text I type will be in bold from now on. You can turn it off in the same way.

 **Note:** The visual editor can use keyboard shortcuts, and the editor will tell you the shortcut keys next to the toolbar option you are selecting, if there is one.

Standard shortcut keys are also supported, like cut/copy/paste:

- `CTRL-X` - Cut.
- `CTRL-C` - Copy.
- `CTRL-V` - Paste (formatted).
- `CTRL-SHIFT-V` - Paste (plain text).

Additional formatting:

- `CTRL-I` - *Italic text*
- **Big text** or Small text
- Superscript text or Subscript text
- Computer code formatting
- `CTRL-U` - Underline



and many more.

You can also highlight the text you want to format and then click the button - the editor will tag the text you highlighted.

Similarly with links to other pages, like [Did You Know](#). Either click the Links button in the toolbar, enter the page name and click **Done**. You then have the opportunity to edit alternative text directly over the link. The same is true for an existing link when you click on it.

Bullets and numbered lists (and indentation) can be accessed from the **Structure** button.

- Bulleted lists (like this one). There's no shortcut key, but you can start a bulleted list by entering an asterisk followed by a space.
- 1. Numbered list items like this one. There's no shortcut key, but you can start a numbered list by entering a number followed by a full stop and a space. Or a hash symbol followed by a space for a new numbered list.

Paragraph formatting can be accessed from the **Paragraph Formatting** drop-down list in the toolbar.

- Headings (level 2-5)
- Preformatted Code formatting
- Centre text

and many more.

Warning: You currently can't mark anything as `nowiki` formatting, or as `noinclude`. Sorry - you have to use the Source Editor for that.

You have undo and redo buttons (and their normal shortcut keys (`CTRL-Z` and `CTRL-Y`)).

If you are familiar with WikiText markup and start typing in the syntax from WikiText (like `{{` to insert a template), the Visual Editor is going to recognise that and either format the text or popup the dialogue associated to that WikiText markup - in the example above, it will open up the *Insert Template* dialogue for you, so the markup can be used as shortcuts in most cases. It doesn't work for bold and italic or images, but pretty much for everything else, so handy to know.

If you paste WikiText markup from source editing into the Visual Editor, it will convert the text for you, rather than see it as plain text - super useful when copying between pages.

Other essential page formatting is more complicated:

Tables can be inserted easily enough using the **Insert** button and selecting *Table*. Click the button and a table is inserted into the page.

You can use the buttons to add columns and rows. You can also edit the properties of the table with the **Properties** button, for example, to get rid of the caption if you don't want it.

Editing the contents of the table is directly in the cells themselves - much easier.

Warning: Unfortunately, you can't (yet) add searchable tables through the visual editor. You should switch to source editing to add this functionality.

Images are covered in a following section.

6.5 Standards

To maintain a fairly standard set of documentation, use the following guidelines:

- Buttons should be in **Bold**.
- Tabs and menu options should be in *italics*.
- Keyboard shortcuts or code should be in `Code` or `Preformatted` format.



- Leave two lines between sections.
- Use templates - see [Templates](#) section below.
- Reuse documentation where possible - if there is already a page describing how to use or do something, include that page - see [Transcluding](#) below.

6.6 Images

Images must be uploaded to be used in pages, which is a bit of a pain, but really aids in reusability of images.

Warning: Bear in mind that, with either Source or Visual editing, you can't trim or edit the image when it's uploaded, so make sure what you're uploading is what you want to see in the final document.

Warning: Be very wary of using scalable graphics formats, such as SVG. Although they look fine in the web pages, the images do not render in the PDF print at this time.

When source editing:

These images need to be saved first.

Easiest is to use an image editing application such as MS Paint, which makes this fast and easily editable.

- Take a screenshot of your screen (CTRL-PrtSc) or the active window (ALT-PrtSc).
- Paste into Paint.
- Crop and Save to a local file - use PNG format by preference.

Alternatively, use the Windows Snip and Sketch tool to do the same.

Clicking the **Image** button will show a dialogue to enter:

- *Filename:* enter a filename for an image that has been uploaded, or enter a new name. Keep it relevant, like "VEhub_Login.PNG"
- *Caption:* optional
- *Alternative text:* optional
- *Size:* optional, but any image that you are uploading that is greater than 1000px wide should be reduced to that or 800px, to make them fit in the PDF when produced.
- *Align:* *Left, Center, Right* or *None*.
- *Format:* Choose *None*.

You have an **Upload** button here, so you can upload the image you have already saved to your PC.

When visual editing:

You have lots of options to create a new image.

- You can take a screenshot of a screen or window as above or copy an image from a document or filesystem, then just paste (CTRL-V) in the editor - the *Image* dialogue will appear, showing a thumbnail, allowing you to name the image, then edit any properties. Steps:
 - ◆ Paste the image - the image popup will appear.
 - ◆ The image will initially be named "image.png" - that's OK, as we will change it in a minute - Check "This is my own work" and then click **Upload**.
 - ◆ Enter a name - make sure that this is unique and relevant, , like "VEhub_Login.png" or "Tesla Order Search 1.png".
 - ◆ Enter a description - the dialogue forces you to enter a description - you could just copy in the filename, or (preferably) enter a description, maybe also a unique ID like the screen name.
 - ◆ Click **Save** - the properties box will be displayed - see below..
- You can drag and drop a local image from your PC straight to the window. When you drop it, the *Image* dialogue will appear, showing a thumbnail, allowing you to name the image (which will default to the name of the file being uploaded). From that point, it's similar to the above process, of uploading, naming, saving and editing properties.



- You can choose images you have recently uploaded by selecting the **Insert** button on the toolbar and selecting *Images and Media*. You can then select the image from the *Search* tab, select it, click **Use this image** and then amend the properties. This is super-useful when combined with batch uploading of images (below).
- You can choose to re-use images that have already been uploaded onto the Assist by anyone - select the **Insert** button on the toolbar and selecting *Images and Media*. You can then search for images by their name from the *Search* tab. When you find an appropriate image, you can select it, click **Use this image** and then amend the properties.
- You can directly upload a saved image by selecting the **Insert** button on the toolbar and selecting *Images and Media*. You can then select the image from the *Search* tab and then amend the properties.

The properties you can edit are:

- *Caption*: optional
- *Alternative text*: optional
- *Position*: Left, Center, Right or None. Choose Center or None. It will turn itself off if you select a Basic image.
- *Image Type*: Choose Basic.
- *Image Size*: optional, but any image that you are uploading that is greater than 1000px wide should be reduced to that or 800px, to make them fit in the PDF when produced.

Then you can insert the image.

For updating an image that already exists, however, your options are more limited. It's important that we update images, rather than upload new ones. If you attempt to paste in an image and call it the same thing as something that already exists, Visual Editor will throw an error.

To update the image, you have to save as a picture file first:

- From a Word document, right-click, Save as Picture, give it a name and save.
- From printscreen, paste into your paint application and save as PNG.
- From Snip and Sketch, save as PNG.

You can then:

- click on the image link and upload a new version from the upload page.
- click *Upload File* from the Wiki Tools toolbar on the left and upload a new copy.
- batch upload the file - see below for details.

Regardless of which editor you are using, you also have the ability to batch upload images. So, if you have created all the images you need and named them appropriately, you can upload those images using the Special page "*Upload Multiple Files*". From there, you can drag and drop or multi-select all of your images into the system, then use them in your page.

- Save your images to local files in a unique and reasonable filename - if it's reusable for other things, make them relevant, as above.
 - ◆ From a Word document, right-click, Save as Picture, give it a name and save.
 - ◆ From printscreen, paste into your paint application and save as PNG.
 - ◆ From Snip and Sketch, save as PNG.
- Go to the Assist Special pages
- Select *Upload Multiple Files*
- Enter a description if you want - it's optional, but can be useful. For example, if uploading a load of images relating to a Tesla Support document, you might enter "Tesla Support Images". But you can also leave this blank - that's perfectly fine.
- Either
 - ◆ Select all your images in a Windows explorer and drag and drop to the appropriate place on the page
 - ◆ Click the button, multi-select from the popup explorer and confirm.
- The files you selected will be shown in a list on the page.
- As they are uploaded, they will change colour to show whether they uploaded successfully or not
 - ◆ If they turn green, all good.
 - ◆ If they turn red, they didn't upload - check the error reason and correct.
- **Warning:** Uploading a file that already exists will create a new version of that file - you should check where this image has been used before and make sure that the image you have uploaded is appropriate to all pages that use it.



6.7 Templates

Where possible, the templates created for you should be used when creating and within the document.

We use Templates when we want a consistent look to certain things, from simple things like a notation, to more complicated things like a full document.

You can add templates quite easily:

- Source Editing:
 - ◆ Just type in double-curly bracket notation like `{{Warning}}`
 - ◆ Or Click the **Template** button, type the name or part of the name of the template you want to use, for example "War" then select it and **Insert**.
- Visual Editing: click the **Insert** toolbar option, then *Template*. Type the name or part of the name of the template you want to use, for example "War" then select it and **Insert**.

Some more complicated templates have parameters that can be passed to them. In the example above, "Warning" can accept a single parameter of the warning text itself. It's optional in this case, but some really complicated templates (like Doc Title) have lots that are required to be entered - you use it like this:





- Source Editing:
 - ◆ With positional parameters, just vertical bar delimit the parameters like so: `{{Warning|My warning text}}`
 - ◆ Some templates support named parameters, like so:

```

{{Xref
|Type=Example
|Num=1
|Text=The text describing the cross-reference
}}
```

- ◆ Or Click the **Template** button, type the name or part of the name of the template you want to use, for example "War" then select it. You can then enter the parameters and **Insert**.
- Visual Editing: click the **Insert** toolbar option, then *Template*. Type the name or part of the name of the template you want to use, for example "War" then select it. You can then enter the parameters and **Insert**.

Some simple templates:

- Note - This provides a note graphic  **Note:** like so
- Warning - This provides a warning graphic  **Warning:** like so
- Hint - this provides a hint note  **Hint:** Like so.
- Xref - this provides a cross-reference in a standard format. Use it like so: `{{Xref|Type=Image|Num=1|Text=An image of something}}`
- Incomplete - this adds a warning that the document is incomplete, and adds the document to an Incomplete category, so it can be easily found and completed. Use it like so: `{{Incomplete}}`
- Generic glossaries have been provided for the *CALIDUS* products -
 - ◆ You will find them in the **Glossaries** category.
 - ◆ These can be added to and amended if required by clicking on the glossary template in the editing screen.
 - ◆  **Note:** All Glossaries are now maintained in this Assist, the Calidus HUB. That means that you can add them to your pages or documents or refer to them, but they are all referred to as part of the "obs" namespace. This is a special bit of functionality known as Interwiki, and is dealt with below.
- 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

Some complicated templates:

- Doc Title - creates a document title page.
- Doc Appendix - creates a document appendix page.



Some full document templates: Document templates have been produced for the following document types:

- Requirements
- Estimates
- Functional Specifications
- Small Change Requests
- Test Plans
- ERs
- Patches

and many more.

Full document templates can also be accessed through the [Help:CreateNewPage](#) page.

The links on that page will help you generate a new document or page.

- Enter the title of the page or document you are creating in the right entry box for the document that you want to create.
- Click the button.

The system will copy everything required in the template into a brand new page created for you, so that you can complete editing it.

There are pretty extensive guides in the [Assist](#) category on creating pages (specifically release notes) from Templates - it is advised that you look there for more information.

6.8 Transcluding

Tranclusion is all about re-using pages that you have already created. We can (and should) do this, as "edit once, edit everywhere" applies, meaning that the pages are updated in every other page or category that uses them, massively reducing the amount of effort required to get changes into the right places.

Say for example, you have documented the Resource Allocation process in a page called "Allocate Resources". That screen is called from the Planning Screen and from the Waterfall screen, which are also documented. You want to describe resource allocation in the documentation of those pages, but you don't want to have to type it all in again, or have to keep updating multiple pages because a small change has happened to that Resource Allocation screen. You could just add it as a link, for example, "see Allocate Resources for more information", but you really want a complete document here. Transclusion helps here.

In the Planning page, you add a Header for "Allocating Resources"

- Source Editing: `== Allocating Resources ==`
- Visual Editing: Choose the *Heading 2* format from the toolbar and type "Allocating Resources".

Then we can transclude the page:

- Source Editing: `{{:Allocating Resources}}`
- Visual Editing: On a new line, click the **Insert** toolbar option, then *Template*. Type a colon, followed by the page e.g. `:Allocating Resources`, then select it and **Insert**.

That's it - the page will be included at that point in your Planning page. Whenever Allocating Resources changes, the planning page will also update.

You can see wherever a page is included or linked to in any other pages really easily. Click "*What links here*" in the "*More*" toolbox section. That will show you a list of all:

- *Transclusions* - directly used in a page.
- *Redirects* - stub pages that immediately redirect to this page
- *Links* - just a link has been added.

That way, when you edit a page, if this edit fundamentally affects a document that is produced from those linked pages, you can edit those if necessary, perhaps to increment a version or modified date, if these pages are producing a PDF



book.

6.9 Interwiki

As you know, the Assist systems are based on MediaWiki, then engine that powers Wikimedia.

Each product has its own instance of this, so we have Assist (wiki) instances of (amongst others):

- OBS - Calidus HUB
- MTS - Calidus TMS
- WCS - Calidus WCS
- WMS - Calidus WMS 3pl
- Portal - Calidus Portal (all types)
- MCS - Calidus MCS

In the interests of reducing duplication and possible out of date guides existing within other pages, each of these Assists can use pages out of the other Assists by using a defined interwiki reference.

What that means is you can link to or transclude ANY page from any other Assist, like you would for any page on your Assist.

So, the interwiki shortcuts are:

- Calidus HUB - "obs"
- Calidus TMS - "ctms"
- Calidus WCS - "cwcs"
- Calidus WMS 3pl - "cwms"
- Calidus Portal - "cportal"
- Calidus MCS - "cmcs"

Essentially, you use the Interwiki prefix before the page or template you want to use.

- To use a template from another wiki, the syntax is `{{iw:TemplateName}}`.
- To link to a page from another wiki, the syntax is `[[iw:PageName]]`.
- To transclude a page from another wiki, the syntax is `{{:iw:PageName}}`.
- To use an interwiki link for a DocLink, the syntax is `{{DocLink|iw:PageName}}`.

As mentioned above, Glossaries for all systems are maintained within the Calidus HUB Assist. The page exists in the local wiki, but it transcludes the Calidus HUB version. So, you can continue to use the template `{{WMS Glossary}}` as normal. But you could also use `{{obs:WMS Glossary}}` instead and get the same result.

Best use cases for Interwiki functionality are:

- Repetitively-maintained and used data, for example Glossaries.
- Technical guides linking to customer-facing guides, for example on this wiki [CTMS Paragon Interface](#), where the customer-facing guide maintained in the CTMS Assist is both linked to and transcluded.
- Product-specific pages linking to technical specs, for example, in WMS, you would find [PoD Guide](#), which links to the Port of Dover SDD on this Assist [SDD 350229 Port of Dover Solution Design](#) as a DocLink to download the PDF i.e. `{{DocLink|obs:SDD 350229 Port of Dover Solution Design}}`

In this way, we further promote the "write once, write everywhere" mentality and reduce effort, which providing a more connected, more up to date documentation set to our customers.

6.10 Categories

Categories are used to group pages together. A category can be used to see all pages in that category, and can also be used to produce a combined PDF book of all pages in that category.

You add categories like this if you are editing the source page: `[[Category:Assist Guides]]`



When using the Visual Editor, you can add Categories from the **Menu** button on the top-right of the Visual Editor toolbar, and click *Categories*.

Any categories already on the page will be listed here. You can remove them, or add to existing ones by searching for the category in the box, or even create new categories - the search box will suggest what to do as you type.

When adding pages to categories that are intended to form part of a PDF book, then we want the pages sorted in a custom way, as opposed to the default, which is alphabetical.

When editing source, you do this as follows:

```
[[Category:Assist Guides|A-099]]
```

Here, we are saying that this page should be sorted in the category as A-099. Other pages will be sorted similarly, and therefore will appear in the correct sequence.

For example:

You have several pages, and you want them in this order on a category "Accounts":

- Accounts Title
- Accounts
- Contracts
- Invoices
- Debrief by Invoice
- Service Offerings
- Internal Recharging
- Accounts Appendix

If these pages were just added to the "Accounts" without sorting like `[[Category:Accounts]]`, they would appear in this sequence:

- Accounts
- Accounts Appendix
- Accounts Title
- Contracts
- Debrief by Invoice
- Internal Recharging
- Invoices
- Service Offerings

So, what we should do is add them with a sort key, for example:

- Accounts Title - added as `[[Category:Accounts|000]]`
- Accounts - added as `[[Category:Accounts|100]]`
- Contracts - added as `[[Category:Accounts|110]]`
- Invoices - added as `[[Category:Accounts|120]]`
- Debrief by Invoice - added as `[[Category:Accounts|130]]`
- Service Offerings - added as `[[Category:Accounts|140]]`
- Internal Recharging - added as `[[Category:Accounts|150]]`
- Accounts Appendix - added as `[[Category:Accounts|999]]`

The numbering leaves sufficient room to insert more pages in the place that we want them.

A page might (and very much should) be part of several categories.

For example, the Accounts page above is a page that is used as follows:

- Part of the Accounts PDF book
- Part of the CTMS Modules PDF Book
- Part of the CTMS User Guide PDF Book

So that page can be categorised into multiple categories like so:

```
[[Category:Accounts|100]]
[[Category:C-TMS Modules|C-100]]
```



```
[[Category:C-TMS User Guide|BC-100]]
```

Warning: When you add categories to a page, and then you use that page in another page (see Transcluding), the other page will by default inherit the sub-page categories - we don't want this.

So, by default, categories should be included within a `<noinclude>...</noinclude>` tag, like so:

```
<noinclude>
[[Category:Accounts|100]]
[[Category:C-TMS Modules|C-100]]
[[Category:C-TMS User Guide|BC-100]]
</noinclude>
```

Pages that have been added to categories will be shown in the *Categories* section of the toolbar - clicking these links will take you to all pages in that category.

6.11 Saving your Changes

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.

Your comments should reflect the changes. It's good practice to reference any call numbers or system versions associated to the change of you know them. Avoid client names if you can - remember this is standard documentation! For example, for a Salesforce or DevOps change 123465 for customer ABC Travel, adding a new Customer Ref field to a screen, consider entering your comment as follows:

```
Added new Customer Ref field (123456)
```

As documentation should always be updated when software patches or releases are made available or released to a customer system, then consider using the ER/patch/release number in the comment, for example:

```
ER CTMS 047-101 - Added (some functionality) to the screen
```

When a document is going to be changed to a new version, you **should** change the version and date within the document, and add the version number to the start of the comment. For example:

- v0.02 - Draft issue for review
- v1.00 - Ready for Issue.

How this works is slightly different for each editor.

For Source Editing:

- Enter a summary comment.
- Check whether this is a *Minor edit*.
- Optionally you can *Watch this page* - if anyone edits it in the future, you'll get an email. You can manage your watchlist from user preferences accessed from your user name.

Once you have selected, you can do the following:

- **Save changes** - if you haven't entered a summary comment you will be reminded, or the changes will just be saved.
- **Show preview** - as you are probably using realtime previews, probably not required. If you do use it, the changes will be shown on the top of the page, but remember your changes have not yet been saved - use the **Save changes** button as above to commit them.



- **Show changes** - show all changes in text differences showing each line changed, added or modified in a list. Remember your changes have not yet been saved - use the **Save changes** button as above to commit them.

From Visual Editing:

- Click **Save Changes**
- You will be shown a popup - enter your summary here.
- Check whether this is a *Minor edit*.
- Optionally you can *Watch this page* - if anyone edits it in the future, you'll get an email. You can manage your watchlist from user preferences accessed from your user name.

You then have options.

- **Save changes** - if you haven't entered a summary comment you will be reminded, or the changes will just be saved.
- **Review your changes** - show all changes in differences. The changes will be shown in Visual mode with colour highlighting - you can switch to the text differences above as well if that suits you better. Remember your changes have not yet been saved - use the **Save changes** button as above to commit them.

6.12 Some Final Notes

Note:

- 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. See the following section on Categories.
- 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 toolbar.

6.13 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
- If you use the standard document template with the Doc_Title title page and you specify a version, when you download the PDF, the document will be appended with the version number automatically.
- 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.



7 Assist Global Replace

It is possible to globally replace text in pages with other text.

See https://www.mediawiki.org/wiki/Extension:Replace_Text

Essentially:

- Go to Special:ReplaceText
- Enter text to find
 - ◆ Note: You can use regex here, but be VERY careful.
- Enter text to replace
- Enter a prefix - this serves as a filter of the pages you want to replace.
- Click **Continue**
- You will be shown a list of pages affected (up to 250 at a time)
- You can select those to be replaced with checkboxes.
- Click **Replace**

The replacements will go to a job queue and will be processed one per view of a page.

This can be forced from the command line.

- Log onto the Assist box.
- Open a command window.
- CD into the appropriate Assist\maintenance folder
- Run the following:

```
D:\xampp\htdocs\calidus-assist\OBS\maintenance>D:\xampp\php\php.exe runJobs.php
```

If there is an error, you can clear the jobs from the appropriate assist table using SQL e.g. obs_job.

Some more problem-solving commands:

```
D:\xampp\htdocs\calidus-assist\OBS\maintenance>D:\xampp\php\php.exe showJobs.php
```

```
D:\xampp\htdocs\calidus-assist\OBS\maintenance>D:\xampp\php\php.exe showJobs.php --list
```



8 Assist Help Config in Other Systems

Assist Help Configuration in Other Systems

8.1 CTMS

Access to the database is required.

```
SELECT * FROM ADM_SYSTEM_PARAM
WHERE PARAM_NAME LIKE '%ASSIST%'
```

Update parameter CALIDUS_ASSIST_BASE_URL:

- If set to "/calidus-assist/MTS/index.php" then uses the base URL of the system you're accessing as the start.
- You can set the whole thing with something like:
["https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/index.php"](https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/index.php)

```
UPDATE ADM_SYSTEM_PARAM
SET VALUE = 'https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/index.php'
WHERE PARAM_NAME = 'CALIDUS_ASSIST_BASE_URL'
```

8.2 EPOD

Log on to the APP machine

Find the appropriate APP directory e.g. "C:\Program Files (x86)\Calidus.epod\EPOD_CTYPRD.app"

Edit the file "web.config" in Administrator mode

Find key "AssistURL" and set to the appropriate Assist system e.g.

```
<add key="AssistURL" value="https://calidusassist.adcservices.apteancloud.com/calidus-assist/EPOD/index.php">
```

Save.

8.3 CTL

Log on to the APP machine

Find the appropriate APP directory e.g. "C:\Program Files (x86)\Calidus.CTL\CTYPRD"

Edit the file "web.config" in Administrator mode

Find key "HelpDocument" and set to the appropriate Assist system e.g.

```
<add key="HelpDocument" value="https://calidusassist.adcservices.apteancloud.com/calidus-assist/CTL/index.php">
```

Save.

8.4 WMS

Log on to the system.

Go to Setup/System Registry

Go to Global/General Settings.

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



Set WikiSubPath to WMS/index.php/Main_Page

Save.

Warning: This is not confirmed as working.

Note: This is not accessible from the Help menu Screen Help and Contents and Index menu items, but solely from Help/About, then clicking the Calidus Wiki button.

This functionality (to access context sensitive help) has been requested from the R&D team - this guide should be updated if/when this is complete.

8.5 Bay Diary

Log on to the APP machine

Find the appropriate APP directory.

Edit the file "web.config" in Administrator mode

Find (or add) key "AssistURL" and set to the appropriate Assist system e.g.

```
<add key="AssistURL" value="https://calidusassist.adcservices.apteancloud.com/calidus-assist/WMS/index
```

Save.

8.6 TCM

Warning: This is an incomplete guide.

8.7 TOC

Warning: This is an incomplete guide.

8.8 Portal

Warning: This is an incomplete guide.



9 Assist PDF Production Code

The extension adds the ability to export Wiki pages as PDF, as well as combining pages in categories into a single PDF.

The intention is that, when extracting a PDF document, the application will:

- Prompt for the download of the PDF. This will include a version number if one is provided.
- User saves and the download will appear in the downloads list in the browser.

The process allows for:

- Downloading any single page as a PDF.
- Downloading any category as a book, where the first page in the category is seen as the title page.

Assist also implements the ability to directly access and download a PDF version of a category or page through the use of the [DocLink](#) template.

9.1 Extension:PDFBook

The extension used in Apteian Assist is a heavily-modified version of the extension publicly available.

Note that the version on MediaWiki is out of date and doesn't work properly. The latest version should be downloaded from the git repository, and then amended.

9.2 Versions of the extension

Versions exist in extensions/Old Extensions for MediaWiki versions 1.16 and 1.34.

The latest version in extensions works for 1.39+

9.3 Enabling the extension

- Copy the extension from an existing wiki or codebase.
- Enable in LocalSettings.php

```
<code>
wfLoadExtension( 'PdfBook' );
</code>
```

- Configure in LocalSettings.php

```
<code>
$wgPdfBookTab      = true; # Whether or not an action tab is wanted for printing to PDF
$wgPdfBookLeftMargin  = "1cm";      # Left page margin
$wgPdfBookRightMargin = "1cm";      # Right page margin
$wgPdfBookTopMargin   = "1cm";      # Top page margin
$wgPdfBookBottomMargin = "1.5cm";   # Bottom page margin
$wgPdfBookFont       = "Arial";     # Default font to use if unspecified in content
$wgPdfBookFontSize   = 12;          # Point size of default font
$wgPdfBookLinkColour  = "217A28";   # Colour to use when rendering hyperlinks in text
$wgPdfBookTocLevels   = 2;          # Number of outline levels to use when building the table of contents
#$wgPdfBookExclude    empty        # List of article titles which should not be included in the book
$wgPdfBookFormat     = "single";
$wgPdfBookWidth      = "1000";
$wgPdfBookDebug      = false; // writes extra debugging statements
$wgPdfBookExtDebug   = false; // Extra debugging - Leaves produced HTML files behind so they can be viewed
</code>
```



9.4 Structure of code

There are 3 main files:

- extension.json - the declaration of the extension and the dependencies.
- PdfBookAction.php - the main code
- PdfBookHooks.php - adds hooks to the skins i.e. the links for download/print as PDF.

9.4.1 extension.json

Modified PHP requirement to 7.4 - works fine.

9.4.2 PdfBookHooks.php

Modified function actionLink to call the default as singlebook rather than single, as the changes below format the book better.

9.4.3 PdfBookAction.php

All important code and changes are in public function show.

9.4.3.1 Structure

- Sets up environment and settings
- Extracts all articles
- Creates a cache from the articles, code and querystring
- If cache does not exist,
 - ◆ create content of cache from pages, sorted in category sort sequence if part of a category
 - ◆ Replaces are made for various purposes.
 - ◆ Version of the document is extracted from the pages if present
 - ◆ Splits into title page and content pages
 - ◇ If a single page, splits as the TOC comment
 - ◇ If multiple pages from a category, first page is title, every other page is content
 - ◇ Adds HTML Headers
 - ◇ Builds the HTMLDoc commend.
 - ◇ Converts the articles into a PDF using the HTMLDoc command into the stored cache file.
- If cache does exist,
 - ◆ Version of the document is extracted from the pages if present
- Output the cache file

9.4.3.2 Changes

Added Debug control. Also adds lots of debugging statements. You can view the debug statements in the database - see [Assist Support Guide](#) for some information on how to do that. Also, you can just click Page Logs from the page to see the logs associated to the extraction.

Fixed some bugs in how it refers to \$title in some sections, to ensure that the debugging is correct (now uses \$doctitle instead in debugging and throughout the code where the original document is referenced).

Added formatting checks based on start of title of page being produced. If they start with standard formatting e.g. FS, SDD, OV, UG, then changes format to singlebook. Note this is now the default anyway, so largely redundant.

Adds body and header/footer images, which must be present in the upload directory - they should be anyway:

```
<code>
$bodyimagefile = "$wgUploadDirectory/ApteanPageBk$width.png";
$bodyimagefile = "$wgUploadDirectory/ApteanPageBk$width.png";
```



```

$hfimagefile1 = "$wgUploadDirectory/ApteanHF1.png";
$hfimagefile2 = "$wgUploadDirectory/ApteanHF2.png";
$hfimagefile3 = "$wgUploadDirectory/ApteanHF.png";
</code>

```

Resizes fonts and declares whether there is a title based on the start of the title of the page being produced, like above.

Added code to make DISPLAYTITLE work, although this is commented out in latest version.

Removed reference to HTMLDoc application path - in my tests, this didn't work properly, so removed and hardcoded.

Added code to remove borders around images - doesn't look great in PDF.

Added support for NEW_PAGE span tags - these are added through using NewPage template in pages.

Added attempt to remove smart quotes from produced test - doesn't work.

Added code to remove DocLink templates

Added version to the produced file served back to the user, if the version is in the documents.

Changed lots about how the HTMLDoc command is built.

Added ability to keep produced files for debugging.

9.5 Support

9.5.1 Logging

As mentioned above, when PDF code is run, debug statements will be added to the page logs. These can be accessed from the database directly (see Assist Support Guide) and can also be accessed on the page itself (through the *Page logs* link in the *More* section of the toolbox).

You can extend the debug logging by editing the Assist system's LocalSettings.php or LocalSettingsAdditional.php file and setting extended debugging. This will ensure that the PDF production code saves any files it produces (logging the location), and logs the command used to perform the PDF conversion, which can then be moved and saved locally and tested to find the issue.

9.5.2 Zero Bytes PDF

Problems typically display as the PDF being downloaded is zero bytes or cannot be opened.

The most common issues are with single page PDFs. The normal solutions are:

- For full documents, ensure that there is a heading 1 element in the file being downloaded.
- If you are transcluding pages into a document, there is typically a limit of around 15 transcluded pages before the document will not produce. Instead, consider grouping the pages into a category and extracting that instead of creating a single document.

9.5.3 '?' characters

Occasionally, PDFs will be produced with '?' characters in unusual places. This represents an unprintable character in the PDF. Typically, this is because of smart quotes or hyphen characters, usually because text has been pasted in from a Word document that has "helpfully" automatically changes all hyphens, quotes and single quotes into extended characters. The PDF conversion routine does not support these characters at this time. To solve this, edit the page in question and replace the quotes and hyphens with plain equivalents.

9.5.4 Unexpected Pages in PDF Books

When PDF books are created from Categories, sometimes there are pages included that are not expected.



Most of the time this is caused by inheritance of categories. If a page has a category and this is transcluded into another page, the default is that the page transcluding will inherit the categories listed in the transcluded page.

Check the category list of pages in Assist - usually you will see the offending page, and then the categories can be amended to resolve the issue.

Either remove the categories of the page if it is in the wrong category, or ensure that the categories are surrounded by NOINCLUDE tags. You should use the source editor to do this, as the Visual Editor does not handle this kind of meta data very well.



10 Assist Support Guide

The intention of this guide is to provide support information, and a general knowledge base and tips for the ongoing maintenance of Assist implementations.

10.1 Requirements

MySQL WorkBench

Access to the Assist server.

10.2 Hosted Systems

All hosted systems are documented in SharePoint, along with users and passwords.

You must have access to the SharePoint to read this document.

<https://apteanonline.sharepoint.com/teams/CALIDUS-CONNECTIONS/Shared%20Documents/Forms/AllItems.aspx?id=%2Fteam>

10.3 Updating Data En Mass

By default, MySQL will not allow updating of data without explicit WHERE or LIMIT clauses. To enable this:

- Go to "Edit/Preferences"
- Choose "SQL Editor" Under "Query Results"
- Check "Safe Updates"
- Restart MySQL WorkBench.

⚠ Warning: You will then be able to (for example) delete all data inadvertently, so enable this option with care.

10.4 Viewing BLOB fields

By default, MySQL WorkBench displays all text fields as "BLOB", which you must then right-click and choose "Open Value in Editor". To enable viewing the text directly in the results, do the following:

- Go to "Edit/Preferences"
- Choose "SQL Editor" Under "Query Results"
- Check "Treat BINARY/VARBINARY as nonbinary character string"
- Restart MySQL WorkBench.

💡 Note: Enabling this option comes with a performance hit - some text fields contain the entire page data, so enable this with care.

10.5 Recovering passwords from MYSQL Workbench

First go check where your encrypted file is. Usually it is stored at %AppData%\MySQL\Workbench\workbench_user_data.dat

If different, amend the commands below.

Use Powershell



```
Add-Type -AssemblyName System.Security
$cipher = Get-Content $env:APPDATA\MySQL\Workbench\workbench_user_data.dat -Encoding Byte -Raw
$scope = [System.Security.Cryptography.DataProtectionScope]::CurrentUser
$mysqlpwd = [System.Security.Cryptography.ProtectedData]::Unprotect( $cipher, $null, $scope )
[System.Text.UTF8Encoding]::UTF8.GetString($mysqlpwd)
```

10.6 Common Queries

```
-- Assist SQL aimed at helping with queries

-- Find the page ID
SELECT * FROM obs_assist.obs_page
WHERE PAGE_TITLE LIKE '%SDD_366558%';

-- Find all revisions (to change comments)
SELECT * FROM obs_assist.obs_revision
where rev_page IN
(SELECT page_id FROM obs_assist.obs_page
WHERE PAGE_TITLE LIKE '%SDD_366558%'
);

-- Find unpatrolled pages to set them patrolled
SELECT *
FROM obs_assist.obs_recentchanges
where rc_patrolled = 0;

UPDATE obs_assist.obs_recentchanges
SET rc_patrolled = 1
where rc_user_text = 'StylesC'

-- Check the logs for details of PDF production
SELECT * FROM mts_assist.oh_logging
where log_action = 'PdfBook'
-- order by log_id desc

-- For v1.34 and later, comments have changed:
SELECT log.*, CONVERT(comment.comment_text USING utf8) comment
FROM epod_assist.epodlogging log
left join epod_assist.epodcomment comment
on comment.comment_id = log.log_comment_id
where log_action = 'PdfBook'
--ORDER BY log_id DESC
--LIMIT 20
```

10.7 Assist Database Backup

Backup each database separately.

Use MySQL Administrator Data Export option.

Always check boxes as follows:

- Dump Stored Procedures and Functions
- Dump Events
- Dump Triggers
- Export to Self-contained File
 - ◆ Name with the name of the Assist on the start of the dump.
- Include Create Schema

Advanced Options button

- Comments
- Create-options
- quote-names
- lock-tables



- dump-date
- disable-keys
- tz-utc
- add-locks
- extended-insert

Start Export

10.8 Assist Database Restore

If required, drop the database from MySQL Administrator:

- On Schema explorer, right click on schema and select Drop Schema.

Use MySQL Administrator Data Import/Restore option.

- Import from self-contained file
- Select the database backup dump
- Click Start Import
- Refresh the schema explorer when done - the database should be present.

Restore database users, passwords and permissions when complete.

Will need to create the assist owner with username and password from LocalSettings.php

- From MySQL Admin Management Explorer
 - Users and Privileges
 - Add Account
 - ◆ Login Name and Password - as per LocalSettings.php
 - Administrative Roles tab - check DBA, which checks everything
 - Schema Privileges - add entry
 - ◆ Selected Schema
 - ◆ Check everything (click Select 'ALL' button)
- Click Apply

Normal Assist users will need to be reset either by the users through 2FA, or through [#Resetting User Passwords](#).

10.9 Upgrading a Wiki from 1.16 Upwards

The following is a checklist of actions.

{SYSTEM}

- Extracted - INCOMPLETE
- DB Import - INCOMPLETE
- DB User - INCOMPLETE
 - ◆ {SYSTEM}_owner/{PASSWORD}
- Version 1.31.6 - INCOMPLETE
 - ◆ Move old extensions to old folder - INCOMPLETE
 - ◆ Recreate LocalSettings.php
 - ◆ Update password sender and emergency contact
- Version 1.34.4 - INCOMPLETE
 - ◆ Leave LocalSettings.php
 - ◆ May need to remove some extensions like numberformat and variables
- Version 1.39.8 - INCOMPLETE
 - ◆ Leave LocalSettings.php
- New Extensions and files - INCOMPLETE
 - ◆ Overwrite MW-add-files - INCOMPLETE
- LocalSettings.php - INCOMPLETE



- ◆ require_once "\$IP/LocalSettingsAdditional.php";
- Gadgets and MediaWiki css/js hacks - INCOMPLETE
 - ◆ Import MW-hacks.xml file - INCOMPLETE
- Templates - INCOMPLETE
 - ◆ Import MW-Templates.xml - INCOMPLETE
- Additional Files - INCOMPLETE
 - ◆ C:\Users\twalker\OneDrive - Aptean-online\Documents\Work\Assist\OBS Templates Export
 - ◇ Aptean_Logo.png
 - ◇ Attention_niels_epting.png
 - ◇ Bulbgraph.png
 - ◇ Hint.png
- About/General Disclaimer/Privacy Policy - INCOMPLETE
- Users - INCOMPLETE
 - ◆ admin/Liverpool123
 - ◆ anw/Liverpool123
- Problems
 - ◆ NONE

10.10 Creating a Brand New Wiki

The following is a checklist of actions.

- Copy version 1.39.8 to a WIKI name - INCOMPLETE
 - ◆ Create LocalSettings.php
 - ◆ xxx_owner with appropriate password
 - ◆ Note the password!
- New Extensions and files - INCOMPLETE
 - ◆ Overwrite MW-add-files - INCOMPLETE
- LocalSettings.php - INCOMPLETE
 - ◆ require_once "\$IP/LocalSettingsAdditional.php";
- Gadgets and MediaWiki css/js hacks - INCOMPLETE
 - ◆ Import MW-hacks.xml file - INCOMPLETE
- Templates - INCOMPLETE
 - ◆ Import MW-Templates.xml - INCOMPLETE
- Additional Files - INCOMPLETE
 - ◆ C:\Users\twalker\OneDrive - Aptean-online\Documents\Work\Assist\OBS Templates Export
 - ◇ Aptean_Logo.png
 - ◇ Attention_niels_epting.png
 - ◇ Bulbgraph.png
 - ◇ Hint.png
- About/General Disclaimer/Privacy Policy - INCOMPLETE
- Users - ensure that there is at least an Admin user with full user rights. Note the password:
 - ◆ Log in as administrative user
 - ◆ Special:Create Account
 - ◆ Create admin account - note the password.
 - ◆ Special:User Rights
 - ◆ Check Administrator, Interface Administrator, Bureaucrat and Suppressor
 - ◆ Save user groups

10.11 Extracting Hacks

- Extract from MTS Assist
- Special Pages
- Export Pages
- Add the pages specifically below

```
MediaWiki:Common.js
MediaWiki:Group-user.css
MediaWiki:Common.css
MediaWiki:Vector.css
MediaWiki:Timeless.css
```



```
MediaWiki:Gadget-veCenterLoader.js
MediaWiki:Gadget-autonum
MediaWiki:Gadget-autonum.js
MediaWiki:Gadget-autonum.css
MediaWiki:Gadget-veCenterLoader
MediaWiki:Gadget-veCenter.js
MediaWiki:Gadgets-definition
```

- Ensure the following are checked/unchecked:
 - ◆ Include only the current revision, not the full history - CHECKED
 - ◆ Include templates - UNCHECKED
 - ◆ Save as file - CHECKED
- Export to MW-hacks.xml

10.12 Extracting Templates

- Extract from MTS Assist
- Special Pages
- Export Pages
- Add the pages specifically below

```
Template:DocLink
Template:Doc_Title
Template:Comment
Template:Incomplete
Template:Note
Template:Hint
Template:Warning
Template:Xref
PageTemplate
DocTemplate
```

- Ensure the following are checked/unchecked:
 - ◆ Include only the current revision, not the full history - CHECKED
 - ◆ Include templates - UNCHECKED
 - ◆ Save as file - CHECKED
- Export to MW-Templates.xml

10.13 Extracting Common Additional Files

Take the following from an Assist implementation that has them:

```
Aptean_Logo.png
Attention_niels_epting.png
hint.png
Bulbgraph.png
```

- Special:All Pages
- Enter start of file name in "Display pages starting at:"
- Select File Namespace from drop-down list and then click Go.
- Click on the file until a full-screen version appears.
- Right-click, Save Image As
- Save to your chosen directory.

10.14 Extracting Namespace Files

- Extract from an existing Assist
- Special Pages
- Export Pages
- Add the pages specifically below, replacing the namespace with the namespace of the Assist system - in this case this is from CTMS Assist:



CTMS:Privacy_policy
 CTMS:General_disclaimer
 CTMS:Copyrights
 CTMS>About

- Ensure the following are checked/unchecked:
 - ◆ Include only the current revision, not the full history - CHECKED
 - ◆ Include templates - UNCHECKED
 - ◆ Save as file - CHECKED
- Export to MW-Namespace.xml

 **Note:** You will then need to amend the About page to change the product name and copyright dates.

10.15 Importing Additional Files, Templates and Hacks into a Wiki

- Ensure that all additional files from MW-add-files have been added.
- Upload additional files:
 - ◆ Special:Upload Multiple Files
 - ◆ Add a description if you want
 - ◆ Select the following files:

Aptean_Logo.png
 Attention_niels_epting.png
 hint.png
 Bulbgraph.png

- As soon as you select the files, the files will be uploaded. The page will indicate if there is any error uploading the files (for example if they already exist)
- Upload hacks and templates:
 - ◆ Special Pages
 - ◆ Import Pages
 - ◆ Browse for the file to import, one of (do both)
 - ◇ MW-hacks.xml
 - ◇ MW-Templates.xml
 - ◆ Set InterWiki prefix to the name of the Wiki e.g. MTS, Portal, CTLTMS, etc
 - ◆ Add a comment if you want.
 - ◆ Ensure option "Import to original namespace" is selected
 - ◆ Upload File.

10.16 Importing Namespace Files

- Special Pages
- Import Pages
- Browse for the file to import
 - ◆ MW-Namespace.xml
- Set InterWiki prefix to the name of the Wiki e.g. MTS, Portal, CTLTMS, etc
- Add a comment if you want.
- Ensure option "Import to a namespace" is selected
- Select the namespace from the drop-down list that matches the Assist being imported into, for example, MTS for CTMS, EPOD for C-ePOD, etc
- Upload File.

10.17 Additional Actions

The following are additional actions that are required on installing a new Assist, with some sample pages.

- MediaWiki:Pagetitle-view-mainpage - change this text to define the title of the wiki e.g. Assist - OBS Hub
- Update the main page - the MTS one is the one with all the best notes in.



- Update the Did You Know page with the common Assist-based help topics - there is an example in this Assist of a Did You Know page which can be copied or exported, imported and then edited.
- "Download as PDF" to "Print as PDF" - e.g. "Print as PDF tab in the tab bar, typically on the top of the screen".

You can use the files on this Assist as templates:

- [OBS:About](#)
- [OBS:General_disclaimer](#)
- [OBS:Privacy_policy](#)
- [OBS:Copyrights](#)

10.18 MediaWiki

You can find the MediaWiki license, contributors, FOSS attributions and components here:

- [Special:Version](#).

10.19 Common Maintenance Actions

10.19.1 Creating Users/Resetting User Passwords

It is ALWAYS better to create a new user on the Wiki from the Special page "Create Account". In here, you should create the user and enter the email. This will send an email to the user to reset their own password. Details:

- Go to [Special:CreateAccount](#).
- Enter the username
- Click the box to create a temporary password, or enter a password here.
- **Enter the email address.**
- Click **Create Account**.

However, in the event of correcting a problem, this can be done from the command line:

```
{InstallDrive}:\xampp\php\php.exe {InstallDrive}:\xampp\htdocs\calidus-assist\{wikiname}\maintenance\create
```

⚠ Warning: You must change to the root of the install drive or this will not work e.g. enter "{InstallDrive}:" at the command prompt BEFORE the previous command.

You can also add some parameters to promote the user with group rights, as follows:

```
--bureaucrat      Add the account to the bureaucrat group
--sysop           Add the account to the sysop group
--interface-admin Add the account to the interface-admin group
--custom-groups  Comma-separated list of groups to add the user to. This allows adding the user to any custom
Since MW 1.27, a user is only added to a custom group, if this group actually exists according to $wgGroupPermissions
--force          If account already exists, just grant it rights or change password. Do not create a new account in
```

In the event of needing to change a password, it is ALWAYS better to get the user to do it themselves - if the email has been set up, they can access the reset from there.

System admins can also force the sending of the reset password link from [Special:ResetPassword](#).

In the event that this is simply correcting a previously set password, you can use the command line:

```
{InstallDrive}:\xampp\php\php.exe {InstallDrive}:\xampp\htdocs\calidus-assist\{wikiname}\maintenance\change
```

⚠ Warning: You must change to the root of the install drive or this will not work e.g. enter "{InstallDrive}:" at the command prompt BEFORE the previous command.



10.19.2 Managing Revisions

Sometimes, you may want to roll-back edits, or delete or hide revisions to a page, perhaps to remove dangerous content.

This is controlled through user rights and groups - see below for more information on that.

Using the rollback feature (for administrators and users with the "rollback" right)

- Go to the page history, the user contributions page, or a diff page.
- Find the "rollback" link next to the consecutive edits you want to revert. It appears before the "undo" link.
- Click the "rollback" link. The page will automatically revert to the previous version by another user, and a pre-filled edit summary will appear.
- Save the edit. The change is marked as a "minor" edit in the history.
- Important: After using rollback, it's recommended to check the recent revisions to ensure all disruptive edits were reverted and no constructive edits were accidentally removed.

Using the undo feature (for any user)

- Navigate to the page history.
- Find the specific edit you want to undo in the list.
- Click the "undo" link at the end of that edit's line.
- An edit page will load with the changes from that edit removed. Later edits are retained by default.
- You can modify the default edit summary if needed.
- Click "Save page" to revert the single edit.

When to use which method

- Use rollback for reverting a large number of consecutive bad edits, such as vandalism, by the most recent user. It's a one-click process for authorized users.
- Use undo to revert a single edit or to manually edit the page to combine or resolve conflicts with later edits. The undo feature is available to all users.

You can permanently flatten all history in a page using the command line.

- For page histories: Run the script from your MediaWiki installation's directory. You can delete all old revisions by using the flag or by specifying the page ID.
- Example command (once in your wiki's maintenance directory):
 - ◆ `{InstallDrive}\xampp\php\php.exe deleteOldRevisions.php --delete 123`
- (Replace 123 with the page ID gathered from the page information).
- Note that running this script without `--delete` will just list the count of revisions that will be removed.

To delete a specific revision in MediaWiki, use the RevisionDelete feature, which administrators can enable to hide revisions from public view. This feature allows you to hide the content, username, or edit summary of one or more revisions without permanently removing them. First, enable the permission, then go to the page history, select the revisions using the checkboxes, and click "Change visibility of selected revisions" to hide them.

For administrators using RevisionDelete

1. Enable the permission: Ensure your user account has the permission. This may require editing LocalSettings.php.
2. Go to the page history: Navigate to the page and click the "View history" tab.
3. Select revisions: Check the boxes next to the revisions you want to hide.
4. Change visibility: Click the "Change visibility of selected revisions" button.
5. Choose what to hide: Select the options to hide the content, usernames, or summaries.
6. Apply changes: Add a log comment and click the "Apply to selected revisions" button.

10.19.3 Managing Interwikis

See here for an explanation of what we use this for: [Interwiki](#).

Each product wiki SHOULD be set up so that interwiki links are configured within the CALIDUS HUB only, and then disseminated to the individual Assists.

This is done in the following way:



in LocalSettingsAdditional.php:

```
$wgSharedDB = 'obs_assist'; # The $wgDBname for the wiki database holding the main interwiki table
$wgSharedPrefix = 'obs_'; # The $wgDBprefix for the database. Defaults to the prefix of the current wiki if
$wgSharedTables = ['interwiki'];
```


If they are not, fix the Assist file above.

Current interwikis:

- epod
- cmcs
- ctms
- obs
- cportal
- cvision
- cwcs
- cwms

To add a new/edit an existing interwiki:

- *Wiki Tools/Special pages*
- *View and Edit InterWiki data*
- New
 - ◆ Click *Add an interwiki or language prefix*
 - ◆ Prefix: new unique prefix
 - ◆ Forward - ticked
 - ◆ Transclude - ticked
 - ◆ URL: the assist URL e.g.
https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/Index.php?title=\$1
 - ◆ API: the API URL e.g. https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/api.php
 - ◆ Click **Add**. (You may have to enter a reason).
- Edit
 - ◆ Click the Edit link against the interwiki and make the changes you need, then click **Edit**. (You may have to enter a reason).

 **Note:** You need to be a sysop (a member of the Administrators group) to edit interwiki links. Currently that is the Admin user. See following section.

10.19.4 Maintaining User Rights

You must be an Administrator to do this. Currently that is the Admin user.

Use the *Wiki Tools/Special pages* link.

- User group rights - the rights associated to each group - this is maintained in the LocalSettings*.php files and will likely not change. Check this for a list of the rights that you want to assign. For example, if
- User list - a list of the users
- User rights - allows you to change the groups associated to each user, and therefore the rights allowed.
 - ◆ Find the user ID and click **Load User Rights**
 - ◆ Tick the boxes that you want them to have the rights to under Groups you can change
 - ◇ autoconfirmed user - has confirmed login through email address.
 - ◇ bot - leave unchecked/unassigned - no bots in this system.
 - ◇ administrator - admin/sysop (superuser) rights, patrol other users' unpatrolled edits. Basically everything
 - ◇ interface administrator - amend site CSS and Javascript i.e. a system maintainer.
 - ◇ bureaucrat - auto-patrolled edits
 - ◇ suppressor - revision maintainer
 - ◆ You can also set the following against certain groups:
 - ◇ Expires: - the expiration date - use below instead if required.
 - ◇ Does not expire - check this instead.



10.19.5 Blocking Users

When users leave the organisation, we should block their access for the Assist user. You use Special pages to do this:

- [Special:ListUsers](#) - a list of all users, where you can block a specific user using the link provided. You will be taken to the next page.
- [Special:Block](#) - the mechanism of blocking users. You can get to it from Special pages or from the users list above.

To block users, either:

- Select the Block option against the user in the users list, or go to the block special page directly and enter their username.
- From here, block sitewide, and in block details check all boxes. Then change the expiry to Infinite, and click the button to block the user.

10.19.6 Patrolling Edits

Please see separate guide [Assist - Patrolling edits](#) for more details on this.

10.20 Support Issues

10.20.1 Seeing a Cat in the Background

There is a cat.svg linked from Timeless skin. (/calidus-assist/OBS/skins/Timeless/resources/images/cat.svg). This is the default.

This is configurable in skin.json in the Timeless directory for your Wiki. i.e.
D:\xampp\htdocs\calidus-assist\OBS\skins\Timeless\skin.json

Solution: Set this to user-grey.svg instead.

```
"config": {
  "TimelessBackdropImage": {
    "value": "user-grey.svg",
    "description": "Set it as you would $wgLogo to an appropriate background image. Rec
  },
```

With multiple wiki installs, this is onerous. To facilitate changing multiple wiki installs, there is a directory in D:\Assist Install Files\MW-add-files called skins.

To apply:

- Copy the directory skins.
- Navigate to your Assist main folder e.g. D:\xampp\htdocs\calidus-assist\WMS
- Paste - this will overwrite the config file with the corrected one.

Warning: This file is delivered with MediaWiki. A new install will overwrite this file. If you have updated MediaWiki or installed a new version of the Timeless skin, then compare the saved skin.json file with the new one and update with any new/changed attributes.

10.20.2 Zero Bytes PDF

Problems typically display as the PDF being downloaded is zero bytes or cannot be opened.

The most common issues are with single page PDFs. The normal solutions are:

- For full documents, ensure that there is a heading 1 element in the file being downloaded.
- If you are transcluding pages into a document, there is typically a limit of around 15 transcluded pages before the document will not produce. Instead, consider grouping the pages into a category and extracting that instead of creating a single document.

Some documents will include a <div class="noprnt"> after the title page and a closing div at the end. This used to be require din older versions of the code, but now causes issues. To fix, remove the div and closing div tags (not the top ones around the vardefines, just the ones after that and at the very end).



10.20.3 '?' characters

Occasionally, PDFs will be produced with '?' characters in unusual places. This represents an unprintable character in the PDF. Typically, this is because of smart quotes or hyphen characters, usually because text has been pasted in from a Word document that has "helpfully" automatically changes all hyphens, quotes and single quotes into extended characters. The PDF conversion routine does not support these characters at this time. To solve this, edit the page in question and replace the quotes and hyphens with plain equivalents.

10.20.4 Unexpected Pages in PDF Books

When PDF books are created from Categories, sometimes there are pages included that are not expected.

Most of the time this is caused by inheritance of categories. If a page has a category and this is transcluded into another page, the default is that the page transcluding will inherit the categories listed in the transcluded page.

Check the category list of pages in Assist - usually you will see the offending page, and then the categories can be amended to resolve the issue.

Either remove the categories of the page if it is in the wrong category, or ensure that the categories are surrounded by NOINCLUDE tags. You should use the source editor to do this, as the Visual Editor does not handle this kind of meta data very well.



11 Assist Upgrade Actions

11.1 Purpose

Reasons

- Assist server (online-help) will be sunsetted.
- Some Assist wikis are 16 years out of date and versions are not supported by MediaWiki for any further bug fixes.
- Version of XAMPP (including Apache and PHP) have security vulnerabilities that cannot be resolved without upgrading.
- QoL improvements.

What do we get:

- Technical
 - ◆ Latest security patched Apache, MariaDB and PHP installations.
 - ◆ Latest security patched MediaWiki installations.
 - ◆ New server with supported Windows, hosted on new farm, security enhanced.
 - ◆ Enhanced security of edits through CAPTCHA.
- Maintenance
 - ◆ Easier upgrade path in the future to maintained LTS MediaWiki releases.
 - ◆ Batch Editing/Replacement - through Extension:Nuke/Extension:ReplaceText
 - ◆ 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.
- QoL
 - ◆ Improved editor
 - ◇ 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
 - ◆ Cleaner modern layout, compatible with Mobile - through Timeless/Vector skin
 - ◆ Searching of tables - through bespoke code
 - ◆ Better exporting to PDF in Apteian format- through Extension:PdfBook
 - ◆ Online translation of pages to multiple languages - through Extension:GoogleTranslator
 - ◆ "Peek" at linked pages by hovering over the link. Includes an appropriate thumbnail picture if there is one - through Extension:Popups

11.2 Local Upgrades

See existing system locally hosted

http://localhost:8080/EPOD/index.php/Main_Page

U/P: anw/Liverpool123

Database password is blank!

11.3 Fresh Server Installation

11.3.1 Preparation

- IIS
 - ◆ If IIS is installed, change the default port from 80/443 so it doesn't interfere with Apache. Or change Apache to 8080/41443 - see later, but recommended that 443 remains the SSL port.
- Download the MSI installer - required for VC components. Download from Bitnami
- Download the Visual C++ 2000 SP1 redistributable
- Download Notepad++ - latest version



- Download MySQL WorkBench - latest version.

11.3.2 Installation

- Install Notepad++
- Install MySQL WorkBench
- Install VCredist.exe
- Install xampp
- Run setup_xampp.bat
 - ◆ Update settings if asked.

11.3.3 Configuration

See X:\xampp\readme_en.txt for details

- Right-click xampp-control.exe and Run as Administrator.
- Change config
 - ◆ Click topmost Config button
 - ◇ Change editor to Notepad++
 - ◇ Autostart Apache and MySQL
 - ◇ Change default ports to 8080 and 41443
 - ◇ Apply
 - ◆ Click Config against Apache
 - ◇ Replace 80 with 8080 in httpd.conf
 - ◇ Replace 443 with 41443 in httpd-ssl.conf - should not do this on properly hosted systems
 - ◇ On properly hosted systems, in the VirtualHost section in httpd-ssl.conf, add this line before the end of the definition

```
RedirectMatch ^/$ /calidus-assist/
```

```
</VirtualHost>
```

- Enable Intl and openssl packages for 1.39:
 - ◆ On XAMPP (Windows) open the php.ini by opening the control panel, selecting config on apache section and selecting PHP
 - ◆ Then add extension=intl
 - ◆ Then add extension=openssl
- Change memory limit
 - ◆ php.ini - memory_limit = 128M, all the way up to 512 depending on the size of PDF documents. For example, CTMS User Guide PDF size when produced is nearly 60Mb.
- Click the Service button on the left to install as a service, for Apache and MySQL
- Start (or Restart) Apache and MySql processes - if they were already started, configuration changes will not apply correctly.

11.3.4 HTMLDoc

Install HTMLDoc 1.9.8 into default directory on C drive.

11.3.5 Additional Configuration

If copying an Assist from another machine, where the Apache port number is different to the port number on the new server, you will likely have to change the port number in the LocalSettings.php file

On local servers:



```
$wgServer = "http://localhost:8080";
```

On properly hosted servers:

```
$wgServer = "http://calidusassist.adcservices.apteancloud.com";
```

However, on most installations, the following will work for all types of URL (local or cloud):

```
$wgServer = $wgServer = WebRequest::detectServer();
```

11.4 Upgrading XAMPP PHP

Requires upgrade to PHP to 7.4.3 - current version of the XAMPP that I have is 7.4.2

- Start with a XAMPP version that is compatible (see below) or start with the requirements from 1.34 and upgrade PHP
- Upgrading PHP
 - ◆ Download the version of XAMPP with the version you're after (in this case xampp-portable-windows-x64-7.4.4-2-VC15.7z) - use latest v7.X installer
 - ◆ Rename xampp/php folder to keep it safe.
 - ◆ Extract php folder into xampp
 - ◆ Compare php.ini and make necessary changes for Assist/Wiki
 - ◆ Stop and start Apache.
 - ◆ Note: 7.4.4 works fine with 1.34 - tested locally

11.5 Creating a brand new MediaWiki installation

- Just extract the MW zip file into a new folder under calidus-assist, rename to what you want
- Run configuration (navigate to the site)
 - ◆ database name
 - ◆ table prefix (including underscore e.g. "oh_", "epod_")
 - ◆ Enter your DB password
 - ◆ Regenerate localSettings.php
 - ◆ Enter owner u/p
- Enter the same username/password for the site for the admin user.
- Default skin: Timeless (mobile-friendly)

If you are setting up a shared interwiki (which is standard in a new wiki set up following the instructions and templates below), then you need to follow the instructions in Shared Interwiki below.

Then follow MediaWiki Configuration and following sections

11.6 Shared Interwiki

In order for shared Interwiki to work (which is standard in a new wiki set up following the instructions and templates below), you must then update the user just created to have access to database obs_assist:

- Using MySQL Administrator:
- Open connection to database.
- Click on Administration tab
- Click on Users and Privileges
- Click on your user above.
- Click Schema Privileges
- Click Add Entry...
- Click Selected Schema.
- Select obs_assist from the DDL.
- Click OK
- Check all boxes in Object Rights section.
- Click Apply.



11.7 Upgrading existing MediaWiki

11.7.1 Copying

- Pull HTDOC for wiki systems into server from existing implementation.
- Also favicons and index.html (gateway).
 - ◆ Update the favicon to Apteian - use the one in my MTS wiki - C:\xampp\htdocs\favicon.ico
- Copy all the images from the ROOT images folder (not the subfolders) e.g. C:\xampp\htdocs\MTS\images
 - ◆ ApteianPageBk.png
 - ◆ ApteianPageBk800.png
 - ◆ ApteianPageBk1000.png
 - ◆ Clear_Icon.png
 - ◆ ApteianHF.png
 - ◆ ApteianHF1.png
 - ◆ ApteianHF2.png
 - ◆ pdf.png
- Also images from \$wgResourceBasePath/resources/assets/
 - ◆ Apteian.png
- Pull databases into MariaDB.

11.7.2 Upgrade MediaWiki

- Upgrade MediaWiki
 - ◆ Download the version your after (in this case mediawiki-1.39.8.zip from <https://releases.wikimedia.org/mediawiki/1.39/>)
 - ◆ Backup the database with all procedures and users. Note your root password.
 - ◆ Backup your XAMPP\htdocs folder that you are upgrading e.g.\htdocs\MTS)
 - ◆ Backup your localsettings.php to localsettings.v1.34.old (belt and braces - you can use the one in your backup instead if you like)
 - ◆ Extract new MW version to a local folder (you'll need it again for all your wikis, and it's faster this way)
 - ◆ Copy new MW version over existing MW folder e.g.\htdocs\MTS
 - ◆ Put the localsettings.php back in place.
 - ◆ Go to your URL, plus mw-config e.g. <http://localhost:8080/calidus-assist/MTS/mw-config/>
 - ◆ Follow the instructions as before - stages as below:
 - ◇ Language - select language.
 - Existing Wiki - copy the \$wgUpgradeKey value from localsettings.php into the screen
 - ◇ Welcome to MediaWiki! - does checks - resolve any issues, but should be OK to continue
 - ◇ Connect to database - not required when upgrading an existing wiki
 - ◇ Upgrade existing installation - click Continue - that should be it. Any error, you can probably just continue again
 - ◇ Database settings
 - ◇ Name
 - ◇ Options
 - ◇ Install
 - ◇ Complete!

Notes from previous upgrades:

- (May need to recreate users, specifically the owner from the previous site, as well as all other users.)
 - ◆ Create user, assign all privs for all databases to the admin user, other users don't need as much privilege - check an existing wiki for details
- Reset passwords (must now be 10 mixed characters). Use either of the following:
 - ◆ Special:PasswordReset - enter username and email address.
 - ◆ "C:\xampp\php\php.exe" changePassword.php --user=example --password=example
- Place wiki.png from skins/common/images into resources/common

11.7.3 MediaWiki Configuration

- Enable all extensions, but be aware that some may need to be upgraded/have been upgraded by the wiki.
 - ◆ #wfLoadExtension('Variables'); - doesn't work - not needed - comment out in the LocalSettings.php file



- ◆ #wfLoadExtension('PdfBook'); - doesn't work - needed - you will have to manually upgrade the PDF extension - see notes below.
- Fix the logo and copyright icons again if required:
 - ◆ LocalSettings.php
 - ◇ \$wgRightsIcon = "\$wgResourceBasePath/resources/assets/Aptean.png";
 - ◇ \$wgLogo = "\$wgResourceBasePath/resources/assets/Aptean.png";
 - ◇ \$wgRightsText = "Copyright ".html_entity_decode('©')." 2008-". date("Y")." Aptean ";
 - ◇ localsettings.php to override mail, for using gmail, check settings in C:\xampp\htdocs\EPOD\LocalSettings.php. Also have to set up an apppassword against the gmail account.
 - Add under \$wgShowExceptionDetails: \$wgDeprecationReleaseLimit = '1.0'; # Removes deprecation warnings from the system
- Create the Privacy Policy page if it doesn't exist.
 - ◆ All content submitted to this documentation will be available to all customers of Aptean.
- Use new version of PdfBook (see my MTS folder - old compatible versions are in Old Versions folder)
 - ◆ New PDF Book requires PHP8+ -
 - ◇ Reset the requirement to 7.4 in extension.json
- MediaWiki:Pagetitle-view-mainpage - change this text to define the title of the wiki e.g. Assist - Calidus HUB
- Update the main page - the MTS one in my PC is the one with all the best notes in.
- Update the Did You Know page with the common Assist-based help topics - the MTS one in my PC is the one with all the best notes in, including reference to searchable tables below.
- Create PageTemplate and DocTemplate pages - see local MTS assist for details
- MediaWiki:Common.js - add searchable tables code

```
/* Any JavaScript here will be loaded for all users on every page load. */
```

```
// Javascript/jquery code for searching tables
```

```
function search_table(tableID, value){
    $('#'+tableID+' tr').each(function(){
        var found = 'false';
        if (!$(this).hasClass('non-searchable')) {
            $(this).each(function(){
                if ($(this).find('td.non-searchable').length > 0) {
                    found = 'true';
                } else if (!$$(this).find('th').length > 0) {
                    if($(this).text().toLowerCase().indexOf(value.toLowerCase()) >= 0)
                    {
                        found = 'true';
                    }
                } else {
                    // Always keep the header row
                    found = 'true';
                }
            });
        }
        if(found == 'true')
        {
            $(this).show();
        }
        else
        {
            $(this).hide();
        }
    });
}

$(document).ready(function(){
// Alternative method - makes all tables with 10 or more rows (including header) searchable automatically
//    $("table > tbody > tr:nth-child(10)").closest("table").each(function(index, element) {
//        $("table.apt-searchable").each(function(index, element) {
//            var tableID = this.id;
//            if (tableID == '') {
//                tableID = "aptSearchableTable_" + (index + 1);
//                $(this).attr("id", tableID);
//            }
//            $('<input type="text" id="'+tableID+'_'+index+'" onkeyup="search_table(\''+tableID+'\',$('th
//        });
//    });
});
```

- MediaWiki:Group-user.css - add user-show stuff

```
.apt-user-show {display: block !important;} // code to hide creation of pages on main page if not 1
```



- MediaWiki:Common.css - add searchable tables code and DocLink styles

```
.apt-search-clear {background: url("images/Clear_Icon.png") no-repeat 5px center; padding:5px 5px 5px 30px;
.apt-doclink {box-sizing: border-box;font-family: "Google Sans", Roboto, Arial, sans-serif;line-height: nor
```

- Change Template:DocLink to use class rather than inline style - see version in my MTS.
- "Download as PDF" to "Print as PDF" - e.g. "*Print as PDF*" tab in the tab bar, typically on the top of the screen".
- Change Templates:
 - ◆ All templates - add TemplateData - see my wiki for annotated templates.
 - ◆ Doc_Title - new format.
 - ◇ Doc_TitleNew - change OBS logo so it has "|Logo|link=" at the end.
 - ◇ Doc_Title - change OBS logo so it has "|Logo|link=" at the end.
- MediaWiki:Common.js - remove any editing toolbar js.
- MediaWiki:Vector.js - fix left panel - check the existing code in EPOD
- MediaWiki:Vector.css - h1, h2, h3, h4 {font-family: sans-serif !important;}.
- MediaWiki:Timeless.css - h1,h2,h3,h4, #p-logo-text a {font-family: 'Segoe UI','Segoe UI Emoji','Segoe UI Symbol','Lato','Liberation Sans','Noto Sans','Helvetica Neue','Helvetica',sans-serif !important;} #p-logo-text a {font-variant: normal !important;}.
- Site:About/General Disclaimer/Privacy Policy (from link in footer) - make sure links Aptean, including images. Copy from new MTS site.
- Batch upload the following images from "...MW-add-files\Images to Upload":
 - ◆ Geographylogo.png
 - ◆ hint.png
 - ◆ pdf.png
 - ◆ Attention_niels_epting.png
 - ◆ Bulbgraph.png

Extensions to enable in LocalSettings:

- wfLoadExtension('CategoryTree');
- wfLoadExtension('CodeEditor');
- wfLoadExtension('ConfirmEdit');
- wfLoadExtension('InputBox');
- wfLoadExtension('Nuke');
- wfLoadExtension('PageImages');
- wfLoadExtension('ParserFunctions');
- wfLoadExtension('PdfHandler');
- wfLoadExtension('Renameuser');
- wfLoadExtension('TextExtracts');
- wfLoadExtension('WikiEditor');

The following will be enabled later

- wfLoadExtension('PdfBook');
- wfLoadExtension('Variables');
- require_once "\$IP/extensions/NumberFormat/NumberFormat.php";
- require_once "\$IP/extensions/GoogleTranslator/GoogleTranslator.php";
- wfLoadExtension('TemplateData');
- wfLoadExtension('TemplateWizard');
- wfLoadExtension('VisualEditor');
- wfLoadExtension('Gadgets');
- wfLoadExtension('ReplaceText');
- wfLoadExtension('InterWiki');
- wfLoadExtension('NativeSvgHandler');

Including all necessary settings for each - see MTS LocalSettings for details

Extensions to remove if enabled and move to old subdirectory for safekeeping:

- HistoryOfPage - just doesn't work - affects OBSHUB.
- MakeArticle - replaced with InputBox
- CreateArticle - replaced with InputBox



- JSpoiler - partially replaced with Group-user.css
- PasswordReset - doesn't work, archived
- LocalisationUpdate - not used
- FCKEditor - not used
- NumberFormat - will be replaced with new version
- WikiForum
- DocumentApproval
- MetaKeywordsTag

Extensions to update if enabled:

- PdfBook
- Variables (will eventually be a problem as is deprecated, but not now)
- NumberFormat

Extensions to add if not present:

- GoogleTranslator
- TemplateWizard
- VisualEditor - should be present in 1.39+
- Gadgets - should be present in 1.39+
- SimpleBatchUpload
- NumberFormat
- Variables
- PdfBook
- PageImages

◆ When upgrading, it is necessary to run the following to generate the page images. It will take a while:

```
C:\xampp\php\php.exe C:\xampp\htdocs\calidus-assist\{wikiname}\extensions\PageImages\maintenance\phpinitImage.php
```

- TextExtracts
- Popups

Consider the following new extensions:

- Extension:InlineComments - could use in OBS HUB
- Extension:SmartComments - could use in OBS HUB
- https://m.mediawiki.org/wiki/Extension:Restrict_access_by_category_and_group#:~:text=Even%20though%20MediaWiki
 - ◆ Could use to create customer-specific pages or guides
 - ◆ create customer pages, categorise them into the group and then make those groups private, then assign those groups to users so that they can see their own pages.
 - ◆ E.g. create a group DHL. Add DHL to Groups.php file. Restrict access to DHL group. Make private through LocalSettings. Create a page into category DHL. Only users given the group permission DHL will be able to see pages in that category.
 - ◆ Or consider <https://www.mediawiki.org/wiki/Extension:AccessControl> instead.
- VECancelButton
- Extension:VersionCompare
- Extension:GuidedTour
- Extension:GroupManager
- Extension:GoogleCustomWikiSearch
- Extension:GoogleTranslate - can also save subpages
- (Not yet checked A-F extensions in https://www.mediawiki.org/w/index.php?title=Category:Stable_extensions - there may be others that are useful there.

11.7.4 Gadgets

See [Assist Visual Editor Gadgets](#) for details of how to do this.

Add the following gadgets:



- center
- autonumber

11.7.5 Hack Fixes

These are a number of things that may be required on some or all Assists, but commonly OBSHUB is the one that will require most hacks.

- SectionProfiler. Compare current local MW version to that on the install to see what this needs doing.
SectionProfiler.php Location: includes/profiler/
 - ◆ Actually resolved when moving to 1.34, so no issues there.
- OBS Hub:
 - ◆ Massive issues - Extension: variables might not work now or in the future. Will require a change to all existing specs to replace - a work in progress and can be ignored for now.
 - ◇ See <https://www.mediawiki.org/wiki/Extension:Variables> for notes on getting this to work
 - ◆ bulk replace (excluding templates):
 - ◇ `"[[Category:{{#var:Client}} FS]]" with "[[Category:{{#var:Client}} FS]]\r\n[[Category:{{#vardefine:System|'CALIDUS' ePOD}}]" with "[[Category:{{#vardefine:System|'CALIDUS' ePOD}}]"`
 - ◇ `"{{#vardefine:System|'CALIDUS' ePOD}}" with "[[Category:{{#vardefine:System|'CALIDUS' ePOD}}]"`
 - ◇ Force the bulk edits through from commandline. See extension Extension:Replace Text notes for how to do this (you can access this from Special:Version). Essentially, execute RunJobs.php (perhaps multiple times).
 - ◇ Update all FS/SDD/REQ with new appendix, or will not produce properly. Note that this may only be required on OBS Hub - others don't use HistoryOfPage.
 - ◇ Change Templates:
 - Doc_Appendix - remove HOP.
 - Doc_AppendixNew - remove HOP.
 - EstimateCostDetails2020 - £ sign.

11.8 Additional Actions

The following are additional actions that are required, with some sample pages.

- MediaWiki:Pagetitle-view-mainpage - change this text to define the title of the wiki e.g. Assist - OBS Hub
- Update the main page - the MTS one is the one with all the best notes in.
- Update the Did You Know page with the common Assist-based help topics - there is an example in this Assist of a Did You Know page which can be copied or exported, imported and then edited.
- "Download as PDF" to "Print as PDF" - e.g. "Print as PDF tab in the tab bar, typically on the top of the screen".
- MediaWiki:Editundo might be in a different language - reset to "undo" if it is. This was an old upstream problem that seems to regress fairly regularly.

11.8.1 About

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12 Assist Visual Editor Gadgets

12.1 Resources

- <https://www.mediawiki.org/wiki/VisualEditor/Gadgets>
- <https://www.mediawiki.org/wiki/Extension:Gadgets#Usage>
- https://www.mediawiki.org/wiki/VisualEditor/Gadgets/Add_a_tool

List of common gadgets

- <https://meta.wikimedia.org/wiki/Gadgets>
- https://meta.wikimedia.org/wiki/Wikimedia_Blog/Drafts/VisualEditor_gadgets
- <https://www.mediawiki.org/wiki/VisualEditor/Gadgets>

List of common snippets

- <https://www.mediawiki.org/wiki/Snippets>

Example of replace:

- <https://en.wikipedia.org/wiki/User:%D7%A2%D7%A8%D7%9F/veReplace.js>
- <https://en.wikipedia.org/wiki/User:%D7%A2%D7%A8%D7%9F/veReplace>

First, the gadgets extension must be installed - see Extension:Gadgets.

In general, you have to

- create the Gadget loader js with a unique name e.g. MediaWiki:Gadget-veNAMELoader.js

```
mw.libs.ve.addPlugin( 'ext.gadget.veNAME' );
```

- Add a description to the loader e.g. MediaWiki:Gadget-veNAMELoader

```
Adds SOME FUNCTIONALITY to VisualEditor
```

- Create the gadget js e.g. MediaWiki:Gadget-veNAME.js
- Actually load the gadgets into MediaWiki:Gadgets-definition

```
* veNAMELoader[ResourceLoader|default|dependencies=ext.visualEditor.desktopArticleTarget.init]|veNAMELoader
* veNAME[ResourceLoader|default|rights=hidden|hidden|dependencies=ext.visualEditor.core]|veNAME.js
```

12.2 Examples

12.2.1 Center

- MediaWiki:Gadget-veCenterLoader.js

```
mw.libs.ve.addPlugin( 'ext.gadget.veCenter' );
```

- MediaWiki:Gadget-veCenterLoader

```
Add Center to the Format list in VisualEditor
```

- MediaWiki:Gadget-veCenter.js

```
mw.loader.using( [ 'ext.visualEditor.core', 'ext.visualEditor.mwtransclusion' ] ).then(function () {
// ----- (start of ve.ui.CenterAction definition) -----
// This is based on [lib/ve/src/ui/actions/ve.ui.BlockquoteAction.js] from Extension:VisualEditor.

    ve.ui.CenterAction = function VeUiCenterAction() {
        ve.ui.CenterAction.super.apply( this, arguments );
    };
```



```

OO.inheritClass( ve.ui.CenterAction, ve.ui.Action );

ve.ui.CenterAction.static.name = 'center';
ve.ui.CenterAction.static.methods = [ 'wrap', 'unwrap', 'toggle' ];

ve.ui.CenterAction.prototype.isWrapped = function () {
    var fragment = this.surface.getModel().getFragment();
    return fragment.hasMatchingAncestor( 'center' );
};
ve.ui.CenterAction.prototype.toggle = function () {
    return this[ this.isWrapped() ? 'unwrap' : 'wrap' ]();
};
ve.ui.CenterAction.prototype.wrap = function () {
    var
        surfaceModel = this.surface.getModel(),
        selection = surfaceModel.getSelection(),
        fragment = surfaceModel.getFragment( null, true ),
        leaves, leavesRange;

    if ( !( selection instanceof ve.dm.LinearSelection ) ) {
        return false;
    }

    leaves = fragment.getSelectedLeafNodes();
    leavesRange = new ve.Range(
        leaves[ 0 ].getRange().start,
        leaves[ leaves.length - 1 ].getRange().end
    );
    fragment = surfaceModel.getLinearFragment( leavesRange, true );
    fragment = fragment.expandLinearSelection( 'siblings' );

    while (
        fragment.getCoveredNodes().some( function ( nodeInfo ) {
            return !nodeInfo.node.isAllowedParentNodeType( 'center' ) || nodeInfo.node.
        } )
    ) {
        fragment = fragment.expandLinearSelection( 'parent' );
    }

    // Wrap everything in a <center> tag
    fragment.wrapAllNodes( { type: 'center' } );

    return true;
};
ve.ui.CenterAction.prototype.unwrap = function () {
    var
        surfaceModel = this.surface.getModel(),
        selection = surfaceModel.getSelection(),
        fragment = surfaceModel.getFragment( null, true ),
        leaves, leavesRange;

    if ( !( selection instanceof ve.dm.LinearSelection ) ) {
        return false;
    }

    if ( !this.isWrapped() ) {
        return false;
    }

    leaves = fragment.getSelectedLeafNodes();
    leavesRange = new ve.Range(
        leaves[ 0 ].getRange().start,
        leaves[ leaves.length - 1 ].getRange().end
    );
    fragment = surfaceModel.getLinearFragment( leavesRange, true );

    fragment
        // Expand to cover entire <center> tag
        .expandLinearSelection( 'closest', ve.dm.CenterNode )
        // Unwrap it
        .unwrapNodes( 0, 1 );

    return true;
};
ve.ui.actionFactory.register( ve.ui.CenterAction );

// ----- (end of ve.ui.CenterAction definition) -----

```



```

ve.ui.CenterFormatTool = function VeUiCenterFormatTool() {
    ve.ui.CenterFormatTool.super.apply( this, arguments );
};
OO.inheritClass( ve.ui.CenterFormatTool, ve.ui.FormatTool );

ve.ui.CenterFormatTool.static.name = 'center';
ve.ui.CenterFormatTool.static.group = 'format';
ve.ui.CenterFormatTool.static.title = 'Center';
ve.ui.CenterFormatTool.static.format = { type: 'center' };
ve.ui.CenterFormatTool.static.commandName = 'center';
ve.ui.toolFactory.register( ve.ui.CenterFormatTool );

ve.ui.commandRegistry.register(
    new ve.ui.Command(
        'center', 'center', 'toggle',
        { supportedSelections: [ 'linear' ] }
    )
);
ve.ui.triggerRegistry.register(
    'center', {
        mac: new ve.ui.Trigger('cmd+j'),
        pc: new ve.ui.Trigger('ctrl+j')
    }
);
} );

```

- **MediaWiki:Gadgets-definition**

```

*veCenterLoader[ResourceLoader|dependencies=ext.visualEditor.desktopArticleTarget.init]|veCenterLoader.js
*veCenter[ResourceLoader|rights=hidden|hidden|dependencies=ext.visualEditor.core]|veCenter.js

```

12.2.2 Replace - not required - already enabled in latest VE

- **MediaWiki:Gadget-veReplaceLoader.js**

```
mw.libs.ve.addPlugin( 'ext.gadget.veReplace' );
```

- **MediaWiki:Gadget-veReplaceLoader**

Adds replace button to VisualEditor

- **MediaWiki:Gadget-veReplace.js**

```

/* Translate the following to your language: */
mw.loader.using( 'ext.visualEditor.core' ).then( function () {

if ( !mw.messages.exists( 've-SearchAndReplaceDialog-title' ) ) {
    mw.messages.set( {
        've-SearchAndReplaceDialog-title': 'Search and replace',
        've-SearchAndReplaceDialog-from-label': 'From:',
        've-SearchAndReplaceDialog-to-label': 'To:',
        've-SearchAndReplaceDialog-from-placeholder': 'From text',
        've-SearchAndReplaceDialog-to-placeholder': 'To text',
        've-SearchAndReplaceDialog-replaceAll': 'Replace all',
        've-SearchAndReplaceDialog-replace': 'Replace',
        've-SearchAndReplaceDialog-matchcase': 'Match case',
        've-SearchAndReplaceDialog-replace-complete': 'Found and replaced $1 occurrences',
        've-ReplaceTool-ToolbarButton': 'Replace'
    } );
}
/* end of translations */

/*!
 * VisualEditor replace gadget
 *
 * @copyright [[User:???|Eranroz]] and [[User:Ravid ziv|Ravid ziv]]
 * @license The MIT License (MIT)
 */
function extractText(){
    var nodes = [];
    var model = ve.init.target.getSurface().getModel();
    function getTextNodes( obj ) {

```



```

        var i;

        for ( i = 0; i < obj.children.length; i++ ) {
            if ( obj.children[i].type == 'text'){
                nodes.push(obj.children[i]);
            }

            if ( obj.children[i].children ) {
                getTextNodes( obj.children[i] );
            }
        }
    }
    getTextNodes(ve.init.target.getSurface().getModel().getDocument().getDocumentNode());
    return nodes;
}

function searchAndReplace( fromText, toText, replaceAll, matchCase ) {
    var textNodes = extractText();
    var model = ve.init.target.getSurface().getModel();
    var firstIndex = 0;
    var numReplacements = 0;
    for (var nodeI = 0; nodeI < textNodes.length; nodeI++) {
        var node = textNodes[nodeI];
        var nodeRange = node.getRange();
        var nodeText = model.getLinearFragment(nodeRange).getText();

        var fromIndex = matchCase? nodeText.toUpperCase().indexOf( fromText.toUpperCase(), firstIndex ) :
        if ( fromIndex == -1 ) {
            firstIndex = 0;
            continue;
        }
        var start = nodeRange.from+fromIndex;
        var end = start+fromText.length;
        if (!replaceAll && model.selection.start > start) {
            continue;//skip replacements before selection
        }
        var removeRange = new ve.Range( start, end );
        var transaction = ve.dm.Transaction.newFromReplacement(
            ve.init.target.getSurface().getView().getDocument().model,
            removeRange,
            toText
        );
        var newSelection = new ve.Range(0,0);
        if (!replaceAll) {
            newSelection = new ve.Range( start, start+toText.length );
        }
        ve.init.target.getSurface().getView().changeModel(transaction, newSelection);
        numReplacements++;
        if (!replaceAll) {
            break;
        }
        firstIndex = fromIndex + toText.length;
        nodeI = nodeI -1;
    }
    if (numReplacements==0 || replaceAll) {
        mw.notify( mw.msg( 've-SearchAndReplaceDialog-replace-complete', numReplacements ) );
    }
}

ve.ui.SearchAndReplaceDialog = function( manager, config ) {
    // Parent constructor
    ve.ui.SearchAndReplaceDialog.super.call( this, manager, config );
};
/* Inheritance */

OO.inheritClass( ve.ui.SearchAndReplaceDialog, ve.ui.FragmentDialog );

ve.ui.SearchAndReplaceDialog.prototype.getActionProcess = function ( action ) {
    var fromVal = this.fromInput.getValue(),
        toVal = this.toInput.getValue(),
        matchCase = this.matchCaseCheckbox.getValue();

    if ( action === 'replace' ) {
        return new OO.ui.Process( function () {
            searchAndReplace( fromVal, toVal, false, matchCase );
        }, this );
    } else if ( action === 'replace-all' ) {

```



```

        return new OO.ui.Process( function () {
            searchAndReplace( fromVal, toVal, true, matchCase );
            this.close( );
        }, this );
    }
    return ve.ui.MWMediaDialog.super.prototype.getActionProcess.call( this, action );
};

ve.ui.SearchAndReplaceDialog.prototype.getBodyHeight = function () {
    return 200;
};

/* Static Properties */
ve.ui.SearchAndReplaceDialog.static.name = 'search';
ve.ui.SearchAndReplaceDialog.static.title = mw.msg( 've-SearchAndReplaceDialog-title' );
ve.ui.SearchAndReplaceDialog.static.size = 'medium';

ve.ui.SearchAndReplaceDialog.static.actions = [
    {
        'action': 'replace',
        'label': mw.msg( 've-SearchAndReplaceDialog-replace' ),
        'flags': [ 'constructive' ],
        'modes': 'insert'
    },
    {
        'label': OO.ui.deferMsg( 'visualeditor-dialog-action-cancel' ),
        'flags': 'safe',
        'modes': [ 'edit', 'insert', 'select' ]
    },
    {
        'action': 'replace-all',
        'label': mw.msg( 've-SearchAndReplaceDialog-replaceAll' ),
        'flags': [ 'constructive' ],
        'modes': 'insert'
    }
];

ve.ui.SearchAndReplaceDialog.prototype.initialize = function () {
    ve.ui.SearchAndReplaceDialog.super.prototype.initialize.call( this );
    this.panel = new OO.ui.PanelLayout( { '$': this.$, 'scrollable': true, 'padded': true } );
    this.inputsFieldset = new OO.ui.FieldsetLayout( {
        '$': this.$
    } );
    // input from
    this.fromInput = new OO.ui.TextInputWidget(
        { '$': this.$, 'multiline': false, 'placeholder': mw.msg( 've-SearchAndReplaceDialog-from-p' )
    });
    //input to
    this.toInput = new OO.ui.TextInputWidget(
        { '$': this.$, 'multiline': false, 'placeholder': mw.msg( 've-SearchAndReplaceDialog-to-pla' )
    });
    this.fromField = new OO.ui.FieldLayout( this.fromInput, {
        '$': this.$,
        'label': mw.msg( 've-SearchAndReplaceDialog-from-label' )
    } );
    this.toField = new OO.ui.FieldLayout( this.toInput, {
        '$': this.$,
        'label': mw.msg( 've-SearchAndReplaceDialog-to-label' )
    } );

    this.matchCaseCheckbox = new OO.ui.CheckboxInputWidget( {
        '$': this.$
    } );
    var matchCaseField = new OO.ui.FieldLayout( this.matchCaseCheckbox, {
        '$': this.$,
        'align': 'inline',
        'label': mw.msg( 've-SearchAndReplaceDialog-matchcase' )
    } );

    this.inputsFieldset.$element.append(
        this.fromField.$element,
        this.toField.$element,
        matchCaseField.$element
    );
    this.panel.$element.append( this.inputsFieldset.$element );
    this.$body.append( this.panel.$element );
};

```



```

};

ve.ui.windowFactory.register( ve.ui.SearchAndReplaceDialog );

//----- replace tool -----

function ReplaceTool( toolGroup, config ) {
    OO.ui.Tool.call( this, toolGroup, config );
}

OO.inheritClass( ReplaceTool, OO.ui.Tool );

ReplaceTool.static.name = 'ReplaceTool';
ReplaceTool.static.title = mw.msg( 've-ReplaceTool-ToolbarButton' );

ReplaceTool.prototype.onSelect = function () {
    this.toolbar.getSurface().execute( 'window', 'open', 'search', null );
};

ReplaceTool.prototype.onUpdateState = function () {
    this.setActive( false );
};

ve.ui.toolFactory.register( ReplaceTool );
});

```

- **MediaWiki:Gadgets-definition**

```

*veReplaceLoader[ResourceLoader|dependencies=ext.visualEditor.viewPageTarget.init]|veReplaceLoader.js
*veReplace[ResourceLoader|rights=hidden|hidden|dependencies=ext.visualEditor.core]|veReplace.js

```

Note: may need to be desktopArticleTarget for the loader, as follows:

```

*veReplaceLoader[ResourceLoader|dependencies=ext.visualEditor.desktopArticleTarget.init]|veReplaceLoader.js

```

12.2.3 Autonumber Headings

The settings for autonumbering of sections has been removed from user preferences in later versions.

The following re-enables it as a gadget.

MediaWiki:Gadgets-definition:

```

* autonum[ResourceLoader]|autonum.css|autonum.js

```

MediaWiki:Gadget-autonum

Allow ability to auto-number headings when viewing pages (replacing setting removed from MediaWiki v1.39)

MediaWiki:Gadget-autonum.js

```

/**
 * Auto-number headings
 *
 * @source https://www.mediawiki.org/wiki/Snippets/Auto-number_headings
 * @author Krinkle
 * @version 2024-07-28
 */
var toc = document.querySelector( '#toc' );
if ( toc ) {
    document.body.classList.add( 'tpl-autonum-attr' );
    // Support legacy Parser: <h2><span class=mw-headline id=?>
    // Support Parsoid: <section><div class=mw-heading><h2 id=?>
    document.querySelectorAll( '.mw-parser-output :is(h1,h2,h3,h4,h5,h6) .mw-headline[id], .mw-parser-output .
        var num = toc.querySelector( 'a[href="#" + CSS.escape( headline.id ) + "]" .tocnumber' );
        if ( num ) headline.setAttribute( 'data-autonum', num.textContent );
    });
} else {
    document.body.classList.add( 'tpl-autonum' );
}

```



MediaWiki:Gadget-autonum.css

```

/**
 * Auto-number headings
 *
 * @source https://www.mediawiki.org/wiki/Snippets/Auto-number_headings
 * @author Krinkle
 * @version 2024-07-28
 */


/**
 * CSS mode:
 * Insert numbers on pages without a TOC. This could in principle work for all pages,
 * but to ensure consistency between the TOC and heading numbers we let JS follow
 * the TOC if there is one.
 */
.tpl-autonum .mw-parser-output {
  counter-reset: autonum-h2 autonum-h3 autonum-h4 autonum-h5 autonum-h6;
}
.tpl-autonum .mw-parser-output h2 {
  counter-reset: autonum-h3 autonum-h4 autonum-h5 autonum-h6;
}
.tpl-autonum .mw-parser-output h3 {
  counter-reset: autonum-h4 autonum-h5 autonum-h6;
}
.tpl-autonum .mw-parser-output h4 {
  counter-reset: autonum-h5 autonum-h6;
}
.tpl-autonum .mw-parser-output h5 {
  counter-reset: autonum-h6;
}
.tpl-autonum .mw-parser-output h2 .mw-headline:before,
.tpl-autonum .mw-parser-output .mw-heading h2:before {
  counter-increment: autonum-h2;
  content: counter(autonum-h2) " ";
}
.tpl-autonum .mw-parser-output h3 .mw-headline:before,
.tpl-autonum .mw-parser-output .mw-heading h3:before {
  counter-increment: autonum-h3;
  content: counter(autonum-h2) "." counter(autonum-h3) " ";
}
.tpl-autonum .mw-parser-output h4 .mw-headline:before,
.tpl-autonum .mw-parser-output .mw-heading h4:before {
  counter-increment: autonum-h4;
  content: counter(autonum-h2) "." counter(autonum-h3) "." counter(autonum-h4) " ";
}
.tpl-autonum .mw-parser-output h5 .mw-headline:before,
.tpl-autonum .mw-parser-output .mw-heading h5:before {
  counter-increment: autonum-h5;
  content: counter(autonum-h2) "." counter(autonum-h3) "." counter(autonum-h4) "." counter(autonum-h5) " ";
}
.tpl-autonum .mw-parser-output h6 .mw-headline:before,
.tpl-autonum .mw-parser-output .mw-heading h6:before {
  counter-increment: autonum-h6;
  content: counter(autonum-h2) "." counter(autonum-h3) "." counter(autonum-h4) "." counter(autonum-h5) "."
}

/**
 * JS mode: When a TOC is present, autonum.js sets the data-autonum attribute
 * and we display that instead of an automatic counter.
 */
.tpl-autonum-attr .mw-parser-output .mw-headline[data-autonum]:before,
.tpl-autonum-attr .mw-parser-output h2[data-autonum]:before ,
.tpl-autonum-attr .mw-parser-output h3[data-autonum]:before ,
.tpl-autonum-attr .mw-parser-output h4[data-autonum]:before ,
.tpl-autonum-attr .mw-parser-output h5[data-autonum]:before ,
.tpl-autonum-attr .mw-parser-output h6[data-autonum]:before {
  content: attr(data-autonum) " ";
}


```



13 Help:CreateNewPage

 **Note:** You must be logged in to be able to create new pages in Assist.

When you are, shortcuts to create new pages will appear below here.

 **Note:** Choose your document titles well - these will be included in the printed/output PDF documents on the top of every page, and therefore should be very descriptive - examples are provided of the standards being followed.

Similarly, the Products chosen when creating the new page should be used from the list below. This is because the Assist system automatically categorises all pages into sub-categories by Product based on your entry. Choosing the right one means that this is automatic and will be most useful to those using the system.

- CTMS
- EPOD
- MCS
- ASSIST
- TCM
- VEhub
- Vision
- WCS
- PORTAL
- WMS
- Bay Diary
- TOC

13.1 New Pages

13.1.1 Document

- UG DevOps System Description Guide e.g. UG 106181 WCS Maintenance Guide
- Area - Description Guide e.g. Orders - Order Guide

13.1.2 Page

- Name e.g. Planning
- ProgNum e.g. SOS1000, PTV_CONFIG
- Something Guide e.g. Orders Guide
- Screen - Something Tab e.g. Goods Receipt - Details Tab

13.2 Patches/Release Notes

Release notes are broadly in different formats, but all release notes will be categorised automatically for you.

A guide to creating ERs is available here: [Creating an ER](#). Although this is specific to the ER process, the guide is mostly applicable to all other release documents as well.

13.2.1 WMS or TMS Patch

- CTMS e.g. PATCH C-TMS P091
- WMS e.g. PATCH WMS P091



13.2.2 WMS or CTMS Emergency Release

- CTMS e.g. ER C-TMS 047-001
- WMS e.g. ER WMS 046-001

13.2.3 WCS Patch

- Generic - UP{DateYYMMDD}_{Client} e.g. UP250709
- Client Specific - UP{DateYYMMDD}_{Client} e.g. UP250709_CER

13.2.4 EPOD Device/APK Release Note

- e.g. Calidus ePOD Android v4.5 APK 4.05.01.20

13.2.5 EPOD Admin/Server Release Note

- e.g. Calidus ePOD Server 4.5.1.12

13.2.6 Portal Release Note

- REL Sys Version Client-Optional
- e.g. REL Portal 2.03.01
- e.g. REL Portal 11.03.01 CTY

13.2.7 General Release Note

- REL Sys Version Client-Optional
- e.g. REL MCS 2.03.01
- e.g. REL Portal 11.03.01 CTY

13.3 Specific Document Types

13.3.1 Functional Specification

- FS 123456 Client - DocName

13.3.2 Estimate

- EST 123456 (ClientRef) Client - DocName

13.3.3 Solution Design

- SDD 123456 Client Solution Design

13.3.4 Small Change Request

- SCR 123456 - DocName



13.4 Category Utility Pages

These are used when creating a title page and appendix page to group loads of categorised pages into a single combined book.

13.4.1 Document Title Page

- {DocName} Title e.g. similar to the Document titles above
 - ◆ UG DevOps System Description Guide e.g. UG 106181 WCS Maintenance Guide Title
 - ◆ Area - Description Guide e.g. Orders - Order Guide Title

13.4.2 Document Appendix Page

- {DocName} Appendix e.g. similar to the Document titles above
 - ◆ UG DevOps System Description Guide e.g. UG 106181 WCS Maintenance Guide Appendix
 - ◆ Area - Description Guide e.g. Orders - Order Guide Appendix



14 Help:CreateNewWiki

Warning: This page has been superseded by [Assist Upgrade Actions](#). See there for more information. However, this old version might contain some useful information, so is preserved.

14.1 Initial Setup

- Copy an existing WIKI folder to a new folder and rename to your Wiki.
- In this folder:
 - ◆ Rename the LocalSettings.php to *.old.php
 - ◆ Remove config/LocalSettings.php

14.2 Configuration

Connect to the site in a browser, and click the 'Set up the Wiki' link to configure and enter all the details required:

14.2.1 Site config

- Wiki name: Must not be blank or "MediaWiki" and may not contain "#". Enter the Product name here e.g. WCS, EPOD, TTM, etc
- Contact e-mail: Your email address.
- Language: en
- Copyright/license: No license metadata
- Admin username: Usually this is set to <wiki>_owner
- Password: Any password you like, but don't forget it. The password cannot be the same as the username.
- Object caching: No caching

14.2.2 E-mail, e-mail notification and authentication setup

- E-mail features (global): Enabled
- User-to-user e-mail: Enabled
- E-mail notification about changes: Enabled for changes to user discussion pages, and to pages on watchlists
- E-mail address authentication: Enabled

14.2.3 Database config

- Database type: MySQL
- Database host: localhost
- Database name: <wiki>_assist
- DB username: <wiki>_owner
- DB password: Any password you like, but don't forget it.
- Superuser account: Use superuser account if you have it
- Superuser name:
- Superuser password:

14.2.4 MySQL-specific options

- Database table prefix: <wiki>_
- Storage Engine: InnoDB
- Database character set: MySQL 4.1/5.0 binary

Click the **Install MediaWiki** button to create the configuration file.

Once complete, copy the config/LocalSettings.php to the root directory of this new wiki.

14.3 Further Configuration

Edit the LocalSettings.php file created above and paste the following at the bottom of the file:

```
# Restrictions
```



```

#Restrict anonymous editing
$wgGroupPermissions['*']['edit'] = false;
# Prevent new user registrations except by sysops
$wgGroupPermissions['*']['createaccount'] = false;
# Add permissions to autoconfirmed users
$wgGroupPermissions['creator']['delete'] = true;
$wgGroupPermissions['creator']['autopatrol'] = true;
# True Anonymous access
$wgShowIPinHeader = false;

# Settings for PDFBook
require_once( "$IP/extensions/PdfBook/PdfBook.php" );
$wgPdfBookLeftMargin = "2cm";           #Left page margin
$wgPdfBookRightMargin = "2cm";         #Right page margin
$wgPdfBookTopMargin = "2cm";           #Top page margin
$wgPdfBookBottomMargin = "1cm";        #Bottom page margin
$wgPdfBookFont = "Arial";              #Default font to use if unspecified in content
$wgPdfBookFontSize = "11";             #Point size of default font
$wgPdfBookLinkColour = "217A28";      #Colour to use when rendering hyperlinks in text
$wgPdfBookTocLevels = "2";            #Number of outline levels to use when building the table of content
$wgPdfBookExclude = empty List of article titles which should not be included in the book

# Settings to get the Help extensions working
require_once( "$IP/extensions/ParserFunctions/ParserFunctions.php" );
#$wgPFEnableStringFunctions = true;
require_once("$IP/extensions/NumberFormat/NumberFormat.php");

# Settings to enable SVG - doesn't work
#$wgFileExtensions[] = 'svg';
#$wgAllowTitlesInSVG = true;

# WikiForum settings
#require_once("$IP/extensions/WikiForum/WikiForum.php");

# Document Approval settings
#require_once("$IP/extensions/DocumentApproval.php");

# MakeArticle settings
require_once("$IP/extensions/makearticle/makearticle.php");

# CreateArticle settings
require_once($IP . "/extensions/CreateArticle.php" );

#Collapsible Text settings
require_once("$IP/extensions/JSpoiler.php");

#UDEF Variables settings
require_once( "$IP/extensions/Variables/Variables.php" );

#WYSIWYG editor
#require_once("$IP/extensions/FCKeditor/FCKeditor.php"); //works but it breaks the Special:Version page

# Settings to get full error details from Wiki
$wgShowExceptionDetails = true;

#Display Webpages in Wikis
include("extensions/anywebsite.php");

$wgCopyrightIcon = "<a href=\"http://www.obs-logistics.com\" target=\"_blank\"><img src='/calidus-assist/W
# Default User Options for new users:
$wgDefaultUserOptions['forceeditsummary'] = 1;

```

Change the existing `$wgEnableUploads` variable to true.

Change the existing `$wgDefaultSkin` variable to 'vector'.

Change the existing `$wgPasswordSender` variable to your email address.

Save the `LocalSettings.php` file.

You can now log on to the new wiki as the admin user you created earlier.



14.4 Creating the basic content

Edit MediaWiki:Common.js (index.php?title=MediaWiki:Common.js&action=edit or just search for MediaWiki:Common.js) and add the following:

```

mwCustomEditButtons.push({
  "imageFile": "images/Button_enter.png",
  "speedTip": "Line break",
  "tagOpen": "<br />",
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_upper_letter.png",
  "speedTip": "Superscript",
  "tagOpen": "<sup>",
  "tagClose": "</sup>",
  "sampleText": "Superscript text"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_small.png",
  "speedTip": "Small",
  "tagOpen": "<small>",
  "tagClose": "</small>",
  "sampleText": "Small Text"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_gallery.png",
  "speedTip": "Insert a picture gallery",
  "tagOpen": "\n<gallery widths=600px heights=350px perrow=1>\n",
  "tagClose": "\n</gallery>",
  "sampleText": "Image:CTLTMS_Example1.PNG|'Caption1'\nImage:CTLTMS_Example2.PNG|'Caption2'"
});

var today = new Date();
var monthNames = ["January", "February", "March", "April", "May", "June",
  "July", "August", "September", "October", "November", "December"
];
var stndrdth = ["th", "st", "nd", "rd", "th", "th", "th", "th", "th", "th"];
var dayth = today.getDate() % 10;
mwCustomEditButtons.push({
  "imageFile": "images/Button_CoverPage.png",
  "speedTip": "Insert an Document Title Page",
  "tagOpen": "{{Doc_Title\n|Client=ClientName\n|System='CALIDUS' System\n|Title=Doc Title\n|Referen",
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_LastPage.png",
  "speedTip": "Insert an Document Final Page",
  "tagOpen": "{{Doc_Appendix|\nAppendix=The Appendix Section. Defaults to A\n|Glossary=WCS|WMS|CTMS.",
  "tagClose": "\n}}\n",
  "sampleText": "\n|Estimate=Enter Y if an estimate section is to be included. Use the following fiel"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_blockquote.png",
  "speedTip": "Insert an Estimate template",
  "tagOpen": "{{EstimateCostDetails\n|REQ=Requirements Days\n|EST=Estimation Days\n|FS=Functional Spe",
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_test_header.png",
  "speedTip": "Insert a test plan template",
  "tagOpen": "{{TestPlan_Header\n|Title=Title of test plan\n|Log=Supimix log reference\n|Description=",
  "tagClose": "\n{{TestPlan_CycleFooter}}\n",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_test_header.png",

```



```

    "speedTip": "Insert a test plan cycle",
    "tagOpen": "{{TestPlan_CycleHeader\n|Cycle={{ #vardefineecho: Cycle | {{ #expr: {{ #var: Cycle }} +
    "tagClose": "\n{{TestPlan_CycleFooter}}\n",
    "sampleText": ""
  });

mwCustomEditButtons.push({
  "imageFile": "images/Button_test_add.png",
  "speedTip": "Insert a new test",
  "tagOpen": "{{TestPlan_Test\n|Test={{ #vardefineecho: SubCycle | {{ #expr: {{ #var: SubCycle }} +
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_insert_table.png",
  "speedTip": "Insert a table",
  "tagOpen": '{| class="wikitable" border="1"\n|- bgcolor="silver"\n',
  "tagClose": "\n|\n",
  "sampleText": "! header1 !! header2 !! header3\n|-\n| cell1 || cell2 || cell3"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_comment.png",
  "speedTip": "Insert a comment",
  "tagOpen": '{{comment|text=',
  "tagClose": "\n|sign=[ [User:"+wgUserName+"] ]|date="+today.getDate()+"/"+(today.getMonth()+1)+"/"+today.getYear(),
  "sampleText": "Your Comment Here"
});

```

Edit [MediaWiki:Vector.js](#) ([index.php?title=MediaWiki:Vector.js&action=edit](#) or just search for [MediaWiki:Vector.js](#)) and add the following:

```

window.onload = function (e) {
  document.getElementById('mw-panel').style.position='fixed';
}

```

Export the following pages and files from an existing Wiki:

- Pages

```

Template:Note
Template:Warning
Template:Meta
Template:Clear
Template:H12
Template:H13
Template:Prettytable
Template:!
Template:Comment
Template:Doc_Appendix
Template:Doc_Title
Template:EstimateCostDetails
Template:TestPlan_CycleFooter
Template:TestPlan_CycleHeader
Template:TestPlan_Header
Template:TestPlan_Test
Template:Estimate_Head
Template:WCS_Glossary
Template:WMS_Glossary
Template:EPOD_Glossary
Template:CTMS_Glossary
Template:FS
Template:Estimate
Template:REQ
Template:DocLink
Help:Contents
Help:PDF_Book
Help:CreateNewPage

```

- Files:

```

OBS_Logistics_Logo.JPG

```



Bulbgraph.png
Attention_niels_epting.png

Import the pages into the new Wiki through the Special:Import page.

Upload the images into the new Wiki through the Special:Upload page.

The Wiki should now be ready for use.

14.5 Creating Users

Create users using Email - they will then become autoconfirmed users.

Any users you don't want to track edits (i.e. non-patrolled), add them to the Creator group.



15 Creating a General Release Note

This is a guide to using the general release note format.

15.1 Overview

Note: This should not be used for WMS and CTMS ERs and Patches, or EPOD Server or Android release notes, or WCS release notes. Each of these have very specific requirements for the release notes and have their own templates.

However, this format can be used for formal release notes for other products such as

- TCM
- Bay Diary
- ToC
- VEhub
- TCM
- Calidus MCS
- Portal (although a more specific version exists solely for Portal, the format is based on this one and therefore may be used as a template).

15.2 Creating a new Release Note

Note: You must be logged in.

Go to the main page and click on [Create New Pages from Templates](#)

Find the General Release Note section.

Enter your product release note in the box. The standard naming convention is:

- REL Sys Version Client-Optional
 - ◆ e.g. REL MCS 2.03.01
 - ◆ e.g. REL Portal 11.03.01 CTY

Note: Choose your document titles well - these will be included in the printed/output PDF documents on the top of every page, and therefore should be very descriptive - examples are provided of the standards being followed.

- MCS
- ASSIST
- TCM
- VEhub
- Vision
- PORTAL
- Bay Diary
- TOC

Click **Create New General Release Note**

The system will take you to the page with everything you need for creating a release note, editing in source mode.

You can edit in source mode, or you can flip to visual editing. Either:

- Click *Create* instead of *Create Source* at the top
- Click the pencil icon and select *Visual Editing*.

You will then be editing in Visual Editor.


15.2.1 Source Editing

Change the following at the top of the page

- #vardefine:System - the System e.g. PORTAL, MCS, TCM, TOC, Bay Diary}}



- #vardefine:SystemVers - the major system version
- #vardefine:ERPatch - the minor system version
- #vardefine:ERNumber - the revision number
- #vardefine:Date - the build date DD/MM/YYYY
- #vardefine:Client - optional - the client, if this is a client-specific build. Otherwise leave blank

 **Note:** Choose your product/system well - the Products chosen when creating the new page should be used from the list below. This is because the Assist system automatically categorises all pages into sub-categories by Product based on your entry. Choosing the right one means that this is automatic and will be most useful to those using the system.

- MCS
- ASSIST
- TCM
- VEhub
- Vision
- PORTAL
- Bay Diary
- TOC

This will set the title, system, version, and Build number automatically from what was entered. If you have Preview turned on, it will change a few seconds after you make the changes.

You can then continue editing, adding rows to the different sections, adding or removing unwanted sections, etc.

When complete, enter an editing summary at the bottom of the page and click **Save Changes**.

15.2.2 Visual Editing

Under the header, greyed out, there are 3 variables, used by the page for the titles, version and (importantly) the categorisation of the page. They look like greyed out puzzle pieces.

- #vardefine:System
- #vardefine:SystemVers
- #vardefine:ERPatch
- #vardefine:ERNumber
- #vardefine:Date
- #vardefine:Client

Click on the variable to change and click the **Edit** button - an edit popup will show. Enter the value you want here:


- #vardefine:System - the System e.g. PORTAL, MCS, TCM, TOC, Bay Diary}}
- #vardefine:SystemVers - the major system version
- #vardefine:ERPatch - the minor system version
- #vardefine:ERNumber - the revision number
- #vardefine:Date - the build date DD/MM/YYYY
- #vardefine:Client - optional - the client, if this is a client-specific build. Otherwise leave blank

This will set the title, system, version, and Build number automatically from what was entered. It won't change immediately - it will change when you save the page.

You can then continue editing, adding rows to the different sections, adding or removing unwanted sections, etc.

When complete, you can click **Save Page**. You will be prompted to enter an editing summary - enter one and click **Save Page**.

15.2.3 Sections

 **Note:** If any sections are not required, remove them. There should however always be at least one of the first to sections:

- **Released Modules.**
- **Resolved Issues/Changes.**

The programs included in the patch should be added to the *Release Modules* section.



- Enter the following
 - ◆ *Module* - if there are multiple modules (e.g, Server, Web Client, Webservices) indicate that here
 - ◆ *Program Name* - a unique reference if applicable to the screen/program being released
 - ◆ *Internal Ref* - the DevOps case
 - ◆ *Client Ref* - the Salesforce case if applicable
 - ◆ *Remarks* - a description of the problem and solution.
- If there are database scripts required, add the ID of the script here

Any issues resolved and changes made should be added to the *Resolved Issues/Changes* section.

If there are new screens and they have been added to a default menu, add the details to the *New Screens* section. This section is not required if you are using the *Released Modules* section above.

Note that this is NOT a client specific release note - if the customer has bespoke menus, they are not reflected in this release note.

- *Menu* - the menu/submenu added. Make then italicised.
- *Screen ID* - any ID or name if there is one. Make them italicised.
- *Screen Description* - the screen name or description, or purpose.

Should any new functionality require access control, then this should be entered in the *New Access* section. This section may be omitted if there is no access control on modules or screens mentioned in this release note.

- *Access Type* - where the access is sourced from. This could be functional access, tab access, imports, exports, fields on a screen, user permissions/settings, user types, existing or new system parameters, etc.
- *Name* - the unique name
- *Description* - description of what this does.

Should there be any new or applicable parameter, rule or registry setting or value that directly affects the functionality being released, enter the information in the *New Parameters & Settings* section.

- *Parameter Name* - The parameter name as seen in the screens.
- *Config Level* - The parameter type, level, table on which it is location, screen where it can be found, etc.
- *Description* - A description of the parameter or setting.
- *Setting Values* - the values that may be set for this parameter.

If there is any other system release known to be required for this functionality to work, this next Warning section should be left in. Note that, if the release number of the other systems is known, then reference it directly here. Further, if you have release notes created for this release ER or PATCH, then include them as a link e.g. `[[ER CTMS 047-001]]` in source editing or `CTRL-K ER CTMS 047-001` in visual editing.

15.2.4 Result

Your page will be created. The categories will be set from the variables entered as well.

Assuming we entered the following

- `#vardefine:System - MCS`
- `#vardefine:SystemVers - 2`
- `#vardefine:ERPatch - 03`
- `#vardefine:ERNumber -01`
- `#vardefine:Date - 15/07/2025`
- `#vardefine:Client - blank` - we should not in most of not all cases be building customer-specific release notes.

The title will default to:

- **RELEASE NOTE- MCS**
- Date: 15/07/2025 Ref: REL MCS 2.03.01



The categories will default to:

- MCS ReINote
- REL MCS 2.03

15.2.5 Creating a New Patch Category

At this point, if this is a new product/major/minor version, the specific product/major/minor category will not exist - on the right of the page, the category will be red (in this example REL MCS 2.03).

You should click this link - you will be taken to editing the new category. You need to add this to the product's Release Notes category:

- Source editing
 - ◆ Enter [[Category:MCS ReINote]] into the source editing box, enter a summary comment and save.
- Visual editing
 - ◆ Click the 3-line menu, click *Categories* and start typing MCS ReINote - the category will be shown. Select it then click **Apply Changes**. Enter a summary comment and save.

Note that this is just an example - use your correct product ID, not MCS. See the list above.

Note that if this category already exists, you don't need to do this.

Now, if you go to category "MCS", you will see the sub categories. If you go to category "MCS ReINote", you will see a sub category, in this example "REL MCS 2.03". You can see release notes applied to this product/major/minor version in one place. Example below:

- MCS ReINote
 - ◆ REL MCS 2.03



16 Creating a WCS Patch

This guide covers creating a new WCS Patch, using the automated facilities available through the new page creation utilities, the WCS PATCH template and variables to pre-set titles and categories.

16.1 Creating a new WCS PATCH

 **Note:** you must be logged in.

Go to the main page and click on [Create New Pages from Templates](#)

Enter your WCS PATCH ID in the correct area of the screen e.g. UP250715

Click **Create New WCS PATCH**

The system will take you to the page with everything you need for creating a WCS PATCH, editing in source mode.

You can edit in source mode, or you can flip to visual editing. Either:

- Click *Create* instead of *Create Source* at the top
- Click the pencil icon and select *Visual Editing*.

You will then be editing in Visual Editor.

16.1.1 Source Editing

Change the following at the top of the page

- `#vardefine:SystemVersion` - the system and version e.g. WCS 3.4
- `#vardefine:BuildNo` - the patch ID e.g. UP250715
- `#vardefine:ConnectedTo` - the system that the WCS is connected to e.g. WMS, CTMS

This will set the title, system, version, and Build number automatically from what was entered. If you have Preview turned on, it will change a few seconds after you make the changes.

You can then continue editing, adding rows to the different sections, adding or removing unwanted sections, etc.

When complete, enter an editing summary at the bottom of the page and click **Save Changes**.

16.1.2 Visual Editing

Under the header, greyed out, there are 3 variables, used by the page for the titles, version and (importantly) the categorisation of the page.

- `#vardefine:SystemVersion`
- `#vardefine:BuildNo`
- `#vardefine:ConnectedTo`

Click on the variable to change and click the **Edit** button - an edit popup will show. Enter the value you want here:

- `#vardefine:SystemVersion` - the system and version e.g. WCS 3.4
- `#vardefine:BuildNo` - the patch ID e.g. UP250715
- `#vardefine:ConnectedTo` - the system that the WCS is connected to e.g. WMS, CTMS

This will set the title, system, version, and Build number automatically from what was entered. It won't change immediately - it will change when you save the page.

You can then continue editing, adding rows to the different sections, adding or removing unwanted sections, etc.

When complete, you can click **Save Page**. You will be prompted to enter an editing summary - enter one and click **Save Page**.



16.1.3 Sections

The programs included in the patch should be added to the Release Components section.

- Ensure that the version numbers of each program are added.
- Any programs not included can be removed from the section (the row deleted).
- If there is a database script, add the ID of the script here (no version is required).
- If there are multiple scripts, add them here.

The cases resolved in this release should be added to the Issues/Changes section.

- Internal Ref is DevOps reference
- External Ref is Salesforce reference
- Description should be the description of what is resolved.

Any WCS database changes or additional rules should be added here:

- For database changes, this is optional. You can add the table and field name, the default value and a description of what this is for in the notes. You may reference the Internal Reference above.
- For Rule changes, list the rule level (system, Warehouse, User Group, etc), the rule name, the default value, and the description of the rule.

The Installation Instructions section does not necessarily need changes. However, if your release includes WMS or CTMS releases, and the ER/PATCH number is known, please enter it here for cross reference. If you have release notes created for this ER or PATCH, then include them as a link e.g. `[[ER CTMS 047-001]]` in source editing or `CTRL-K ER CTMS 047-001` in visual editing.

16.1.4 Result

Your page will be created. The categories will be set from the variables entered as well. Assuming we entered the following

- #vardefine:SystemVersion - WCS 3.4
- #vardefine:BuildNo - UP250715
- #vardefine:ConnectedTo - WMS

The title will default to:

- **Software Release - WCS 3.4 for WMS**
- BUILD NUMBER UP250715

The categories will default to:

- WCS WMS PATCH

Now, if you go to category "WCS", you will see the sub categories

- WCS WMS PATCH
- WCS CTMS PATCH

In this example UP250715 will exist in WCS WMS PATCH. Example below:

WCS? (2 C, 4 P)

WCS CTMS PATCH? (2 P)

WCS WMS PATCH? (6 P)

Note that these patch categories also exist under the parent system's categories:

- WCS WMS PATCH -
WMS? (3 C, 9 P)
WCS WMS PATCH? (6 P)
WMS ER? (14 C, 1,683 P)
WMS PATCH? (36 P)
- WCS CTMS PATCH -
CTMS? (4 C, 27 P)




CTMS ER? (23 C, 2,557 P)
CTMS PATCH? (36 P)
CTMS SAR ER? (2 P)
WCS CTMS PATCH? (2 P)



17 Creating an ER

This guide covers creating a new ER, using the automated facilities available through the new page creation utilities, the ER template and variables to pre-set titles and categories.

17.1 Creating a new ER

 **Note:** you must be logged in.

Go to the main page and click on *Help:CreateNewPage*

Enter your ER number in the correct area of the screen e.g. ER CTMS 046-001

Click **Create New ER**

The system will take you to the page with everything you need for creating an ER, editing in source mode.

You can edit in source mode, or you can flip to visual editing. Either:

- Click *Create* instead of *Create Source* at the top
- Click the pencil icon and select *Visual Editing*.

You will then be editing in Visual Editor.

17.1.1 Source Editing

Change the following at the top of the page

- #vardefine:System - the system code e.g. WMS, CTMS, WCS etc.
- #vardefine:SystemVers - the system version e.g. 810, 12, 19, 3.4, etc
- #vardefine:ERPatch - the patch portion of the change e.g. 046
- #vardefine:ERNumber - the number of the ER within the patch e.g. 001

This will set the title, system, version, and ER number automatically from what was entered. It won't change immediately - it will change when you save the page.

You can then continue editing, adding rows to the different sections, adding or removing unwanted sections, etc.

When complete, enter an editing summary at the bottom of the page and click **Save Changes**.

17.1.2 Visual Editing

At the very top of the page, greyed out, there are 4 variables, used by the page for the titles, version and (importantly) the categorisation of the page.

- #vardefine:System
- #vardefine:SystemVers
- #vardefine:ERPatch
- #vardefine:ERNumber

Click on the variable to change and click the **Edit** button - an edit popup will show. Enter the value you want here:

- #vardefine:System - the system code e.g. WMS, CTMS, WCS etc.
- #vardefine:SystemVers - the system version e.g. 810, 12, 19, 3.4, etc
- #vardefine:ERPatch - the patch portion of the change e.g. 046
- #vardefine:ERNumber - the number of the ER within the patch e.g. 001

This will set the title, system, version, and ER number automatically from what was entered. It won't change immediately - it will change when you save the page.

You can then continue editing, adding rows to the different sections, adding or removing unwanted sections, etc.

When complete, you can click **Save Page**. You will be prompted to enter an editing summary - enter one and click **Save**



Page.

17.1.3 Result

Your page will be created. The categories will be set from the variables entered as well. Assuming we entered the following

- #vardefine:System - CTMS
- #vardefine:SystemVers - 12
- #vardefine:ERPatch - 046
- #vardefine:ERNumber - 001

The title will default to:

- **EMERGENCY RELEASE - CTMS 12**
- RELNOTE ER CTMS 046-001

The categories will default to:

- CTMS ER - the general category of all CTMS ERs
- ER CTMS 046 - the specific category of patch 046

17.1.4 Creating a New Patch Category

At this point, if this is a new patch version, the specific patch category will not exist - on the right of the page, the category will be red (in this example ER CTMS 046).

You should click this link - you will be taken to editing the new category. You need to add this to the "CTMS ER" category:

- Source editing
 - ◆ Enter [[Category:CTMS ER]] into the source editing box, enter a summary comment and save.
- Visual editing
 - ◆ Click the 3-line menu, click *Categories* and start typing WMS ER - the category will be shown. Select it then click **Apply Changes**. Enter a summary comment and save.

Note that if this category already exists, you don't need to do this.

Now, if you go to category "CTMS ER", you will see a sub category, in this example ER CTMS 046. You can see ERs applied to this patch in one place. Example below:

CTMS ER? (23 C, 2,557 P)
 ER CTMS 025? (62 P)
 ER CTMS 026? (110 P)
 ER CTMS 027? (75 P)
 ER CTMS 028? (136 P)
 ER CTMS 029? (40 P)
 ER CTMS 030? (26 P)
 ER CTMS 031? (26 P)
 ER CTMS 032? (43 P)
 ER CTMS 033? (37 P)
 ER CTMS 034? (40 P)
 ER CTMS 035? (49 P)
 ER CTMS 036? (29 P)
 ER CTMS 037? (58 P)
 ER CTMS 038? (59 P)
 ER CTMS 039? (43 P)
 ER CTMS 040? (19 P)
 ER CTMS 041? (89 P)
 ER CTMS 042? (111 P)
 ER CTMS 043? (71 P)
 ER CTMS 044? (108 P)
 ER CTMS 045? (103 P)
 ER CTMS 046? (76 P)
 ER CTMS 047? (211 P)



18 Creating Release Notes

This guide is an overview to creating release notes for all systems of all types. There are also detailed guides that are referenced below.

18.1 Overview

On the main page of the Calidus Hub, if you are logged in, you will see a new page option labelled as [Create New Pages from Templates](#):

This page is structured to aid getting into the different document/page generation bits, with some copyable examples.

For example:

- There is a TOC, so you can go straight to the type of document you want to create.
- The TOC is categorised, so you can do
 - ◆ Pages/Documents - plain pages
 - ◆ Patches/Release - Notes
 - ◆ Specific - Document Types
 - ◆ Category - Utility Pages

For the purposes of Release Notes, we will focus on section 2 - Patches/Release Notes.

18.2 Creating Release Notes

This section has subsections for:

- WMS or TMS Patch
- WMS or TMS Emergency Release
- WCS Patch
- EPOD Device/APK Release Note
- EPOD Admin/Server Release Note
- PORTAL Release Note
- General Release Note

Each sub-section shows examples of the naming conventions in use, which makes it much easier to copy and paste the titles, which are important, as they are shown in the PDF document produced, and they form the basis of browsing through Assist.

These are fairly easy and self-explanatory to use. Just fill in what you need, which is primarily the version, and then the devops numbers and the description of the fault and fix. There are other sections, and they may need more typing, but again, just point and click.

The pages created should save to the correct categories, to allow them to be easily browsed.

18.2.1 Using the Templates

In general, follow these steps:

- Enter your title
- Click the button.
- If necessary, click the **Create** button on the top-right to switch to Visual Editing.
- Just type.

There are specific guides to the different types here:

- [Creating a WCS Patch](#)
- [Creating an ER](#)
- [Creating a General Release Note](#)



18.2.2 On Browsing through categories

From the main page:

There are sections for each Product.

Each link here includes the appropriate product release note categories in the results, so you can drill down.

There are sections for:

- Category:Documents by Type - a list of all document types. Under each of these they are typically sub-categorised
 - ◆ Configuration - subcat by customer
 - ◆ Emergency Releases - subcat by product
 - ◆ Estimates - subcat by customer
 - ◆ Functional Specifications - subcat by customer
 - ◆ General
 - ◆ Patches - subcat by product
 - ◆ User Guides - subcat by customer
 - ◆ Release Notes - subcat by product
 - ◆ Requirements (Solution Designs) - subcat by customer
 - ◆ Small Change Requests - subcat by customer
 - ◆ Support Documents
 - ◆ Technical Guides
- Category:Documents by Client - a list of all customers. Typically sub-categorised by document type.
- Category:Documents by Product - a list of all products. Typically sub-categorised by document type.
- Category:Glossaries - Product glossaries. Copy and paste, or include in your Assist pages with {{GlossaryName}}
- Category:Incomplete - a list of all incomplete pages, so we can keep things up to date.



19 Did You Know

Warning: This is the latest Did You Know formatted page, showing all of the latest features that may be enabled within the latest version of Assist. On existing or new Assist implementations, this page should be added, and then modified for specific common functionality for the system.

This guide is intended to help you discover features delivered with *CALIDUS* system.

19.1 *CALIDUS* CTMS

Add any system-specific help pages or notes here. Transclusion is recommended, for re-use purposes.

19.1.1 Accessing Help

You can access these Assist help pages from the Calidus application using the *Help* menu item.

- *Help/User Guide* - Accesses the main page of this Assist.
- *Help/Screen Help* - Accesses a page specifically for the screen that you currently have active.

You can also see the last error displayed, the machine on which CTMS is running, your user and the system version, which you will need if you need to report any issues.

19.2 *CALIDUS* Assist

19.2.1 Searching for Help

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.



19.2.2 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 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 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?

19.2.3 Translating

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.

There will be a banner at the top showing the translation options after you have selected a language - simply click the X on the banner to return to the standard page.

19.2.4 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.

When you are searching for a page, Assist will generally show you the content, not necessarily the document in which it is included.

If you want to find the documents in which the page is included, you can:

- You can click the category/categories of the page, shown on the page itself. The category might have a "*Download as PDF*" link to get all of the pages in the category included in a single document.
- You can click *Page information* link in the *More* menu. Here, you can scroll to the bottom and see "*Page transcluded on*" for details of documents that page is in.



20 Help:PDF Book

This page is intended to help with the automated production of PDF Books from the Assist pages.

There are two ways of creating a PDF document:

- As a single page
- As a book - generated from multiple categorized pages.

20.1 Single Page

For a single page, use the templates provided [here](#). These are designed to help you create new pages or documents, using templates to make the documents work properly.

20.2 Creation of a Book

- Create a title page, as the Document title plus the word "Title" on the end. The page can be created using the template provided. In addition, the footer must be configured on this page, utilising comments. For example:

```
{{Doc_Title|System=Calidus ''Vision''|Title=Vision Coding and Release|Reference=236343|Version=1.0|Date=9th
```

- Add this and all pages to be printed as part of the PDF book to a category of the same name, for example:

```
[[Category:Vision Coding and Release Doc|000]]
```

Note that the Category Sort value should be set to 000 for the title page. All other articles included in the document should have a sort value assigned to them to indicate the position in the document.

- If required, create an appendix page. This [Template](#) can be used as an example. This page should be named as the document title plus the word "Appendix" on the end. Note that the Category Sort should be set to 999 or ZZZ (last in the list of pages).
- Create the Category page as in the following example:

```
=Vision Coding and Release=
This category encompasses pages that collate technical information of how the system is built and installed.
[{{fullurl:{{FULLPAGENAME}}|action=pdfbook&notitle}} Download this selection of articles as a PDF book.]
```

20.3 Production of the PDF

Click the link on the category entry created above, or click the Download/Print as PDF link in the toolbar from the category or from the single page.

20.4 Setup Requirements

See [Assist PDF Production Code](#) for details, but the PDF Book extension should already have been enabled in all Assist instances for you.




21 Process - Estimate Document

This page clarifies the Estimation process, specifically production of an EST document.

21.1 Pre-Requirements

- One or many of:
 - ◆ BRD
 - ◆ SDD
 - ◆ Combined EST


21.2 Process

 **Note:** Regardless of who is doing the FS, the technical aspects should already have been discussed with R&D and noted.

21.3 Creating an EST

The Estimate may be created as a Word doc or within Assist Calidus Hub and exported as a PDF.

21.4 Using the EST Word Template


 **Note:** If an EST spreadsheet of any form has not been done yet, do this now. Instructions for doing this are here: [Process - Using Office Templates](#)


- Double click on the EST Template - this will create a new document
- Replace placeholder text with your text.
- Populate the header
- Copy the requirements from the EST/SDD/BRD into the Client Requirement section
- Create the Solution into the Solution section.
 - ◆ Strongly scope - if there are things that are not included or limited in the solution, make that clear in this section.
- Paste in the estimate values. Ensure that you account for your time, plus any time to issue/review the EST.
 - ◆ If multiple departments/people are involved in the specification of this change, then you should note your time on the estimate in hours in total (plus delta if you have returned to this following review) as a review note.
 - ◆ One of the authors should be assigned the final review, to total up all this time and amend the FS time, and remove any notes relating to this.
- Save as EST-{CaseNo}-{Client} {Desc} v{Version}.docx

{{Note|

- Document properties should be used for the Title.
- These are used in the Heading.
- You can refresh all references in the title using [CTRL-A]-[F9] when in the title section.

21.5 Using Assist Calidus Hub to create an EST

 **Note:** You must be logged in to be able to create new pages in Assist.

- Click the link here: [Create New EST from Template](#)
- Enter the EST name following convention EST-{CaseNo}-{Client} {Desc}.  **Note:** No version in the page name.
- This will start an editor - this may be in Source mode or Visual Editing mode.
- Enter the #vardefine values, following the guidelines in the template.




- Enter text in all sections following the guidelines for the Word Template above.
- Enter the estimate values in the Appendix template provided.
- Save and provide reasonable change notes e.g. v0.01 - initial creation.
- Export the PDF using the link provided - this will append the version number.

 **Note:**

- Follow the guidelines and help here: [Assist Editing Guide](#).

21.6 General Notes

 **Note:** This document should NEVER contain technical notes e.g. packages/procedures, form names, etc. Be general - describe what is being provided, call out which areas are being changed and what is being changed and why this will fulfil the requirements. The ONLY exception is when this estimate is being provided to technical representatives rather than direct to the customers' operational staff.



22 Process - Functional Specification


This page clarifies the Functional Specification Process

22.1 Pre-Requirements

- One or many of:
 - ◆ BRD
 - ◆ SDD
 - ◆ EST (spreadsheet and document)
 - ◆ SOW
 - ◆ Combined EST

22.2 Process


- Requirement and functional overview created by PS lead for the project/change. Also technical notes as to how this was estimated.
- Handover to R&D.
- Testplan created at this stage, wrt scenarios (see below)
- R&D to create technical notes to implement the change as requested.

 **Note:** Regardless of who is doing the FS, the technical aspects should already have been discussed with R&D and noted.

22.3 Creating an FS

The Functional Specification may be created as a Word doc or within Assist Calidus Hub and exported as a PDF.

22.4 Using the FS Word Template

- Double click on the FS Template - this will create a new document
- Replace placeholder text with your text.
- Copy the requirements from the EST/BRD into the Client Requirement section
- Copy the Solution into the Solution section.
- Take any scoping comments from the Solution and move to Scoping.
 - ◆ Strongly scope - if there are things that are not included or limited in the solution, make that clear in this section.
- Ensure that Pre-requisites are populated if required.
- Data section should include any backing data that should be set up and indicate whether this will be done by the client or by Aptean. Indicate whether this will be automated through a script at release, or post-implementation task.
- Implementation Advice should show whether anything else should be setup e.g. EDI, ORS reports, recreating reports, plus details.
- Functional Description should expand on the solution, focussing on detailing the functional components that will change (or not change) as part of this change.
 - ◆ For example, the solution overview may say that a screen is changing to add a new field X. The Functional description should include a prototype screen layout or detailed description of where this field should be, what screen, etc.
 - ◆  **Note:** This section is critical - this section is what is signed off by the customer. Use customer wording or phrases if appropriate, to ensure that the customer understands the functionality in detail. Explain why this solution will fulfil their requirements.
- Technical notes may be structured and formatted in any way you please. However, this section is to be written/reviewed by R&D BEFORE release to the customer.
- The Test Plan should be created (from a template) and embedded in the document in this section, or pasted into this section, as long as this section is landscape.
 - ◆ The test plan should be focussed more on scenario testing than unit testing. It is expected that the R&D




operative will conduct appropriate unit and limit testing WITHOUT having to have explicit instructions, UNLESS that unit/limit testing is core to this change.


- Paste in the estimate values. Ensure that you account for your time, plus any time to issue/review the FS.
 - ◆ If multiple departments/people are involved in the specification of this change, then you should note your time on the estimate in hours in total (plus delta if you have returned to this following review) as a review note.
 - ◆ One of the authors should be assigned the final review, to total up all this time and amend the FS time, and remove any notes relating to this.
- Save as FS-{CaseNo}-{Client} {Desc} v{Version}.docx

Note:

- Document properties should be used for the following:
 - ◆ Title - without references
 - ◆ Version - 2dp e.g. 0.01
 - ◆ Yearcopyright - e.g. 2025
 - ◆ Client Company Name - {Client Name}
 - ◆ Area or Project/System - {System & Release Version}
 - ◆ Reference - {Case No - Cust Ref}
- These are used in the Heading, Footing and title pages.
- You can refresh all referenecs in each section using [CTRL-A] - [F9]

22.5 Using Assist Calidus Hub to create an FS


 **Note:** You must be logged in to be able to create new pages in Assist.

- Click the link here: [Create New FS from Template](#)
- Enter the FS name following convention FS-{CaseNo}-{Client} {Desc}.  **Note:** No version in the page name.
- This will start an editor - this may be in Source mode or Visual Editing mode.
- Enter the #vardefine values, following the guidelines in the template.
- Enter text in all sections following the guidelines for the Word Template above.
- Enter the estimate values in the Appendix template provided.
- Save and provide reasonable change notes e.g. v0.01 - initial creation.
- Export the PDF using the link provided - this will append the version number.

Note:

- Follow the guidelines and help here: [Assist Editing Guide](#).

22.6 General Notes

 **Note:** All technical restrictions should be referred to the project PS lead in a timely fashion. This should not be an email or automated devops - this is directly affecting progress on development - organise a meeting asap to resolve the technical restriction. Bring examples and possibilities to the meeting.



23 Process - Updating Documentation

The intention of this process is to confirm the process that all should follow for documentation of new changes to software.

These are guidelines.

The goal is the important thing - everyone updates documentation.

Some products, or some smaller changes, may not require the full process being followed, but the principles are the same - ensure that documentation for changes to our systems is completed in a timely fashion, in a quality form.

23.1 When should documentation be updated?

For customer-facing documentation, whenever a release is made to the software to a customer system. So, whenever this get's a release note, ER or otherwise. There are exceptions, which should be managed by the development manager and project managers together, such as:

- Long-running project changes.
- Internal development.

For internal documentation, on processes being changed, new changes upcoming that require testing, etc, as and when this is passed to others. Also, this is a continuous process - if others are expected to use software to test or discuss with customers, then technical guides should exist for these functions.

23.2 Who should update documentation?

Everyone.

It is everyone's responsibility to update documentation.

- The developer completes a new development and creates a technical guide.
- The tester updates the technical guide.
- The release administrator updates release documentation.
- When released, the implementer uses the technical guide, the release notes and the specification to update the customer-facing documentation. They also correct any errors in the release documentation.
- The implementer may refine this through testing with the customer (s). This customer-facing and internal documentation is used as the basis of support handover.
- The support team update the documentation and FAQ guides to reflect real-world usage.

23.3 What should be documented or updated?

Everything.

In summary that is:

- Technical guides.
- Screen help.
- Processes.
- Release notes.

All of these combine together to provide us with quality documentation - for our customers and for ourselves.

23.3.1 Technical Guides

Technical guides should exist within CALIDUS Hub (this wiki).

They should be categorised for the product that they are relevant to, and classified as a technical guide.

This is not the same as the technical areas of a functional specification - things can change and adapt as development continues. Therefore this should contain enough pertinent information for the users (i.e. other Aptean staff, departments, etc) to be able to get this process running, for testing and release purposes.



This is the place for fields, tables, SQL if this helps,.

Cross reference any customer-facing documentation in other Assists, so that you do not have to re-type everything.

A good example is in this wiki: [CTMS Paragon Interface](#).

23.3.2 Customer-facing Documentation

This exists with the appropriate product Assist implementation.

Any change, no matter how small, should be reflected in the appropriate pages within the Assist.

If a new page is created, it is important that that page is included in categories for the documents that are being produced for that particular area. This changes per Assist. As for information.

Change details should be provided with each change to each page made.

This should be consistent, but should reflect the patch, ER or release number.

See [Saving your changes](#) in the [Assist Editing Guide](#) for more details.

Change or reflect EVERY page that is required. For example:

- If this change affects maintenance screens, add the new field to the screen documentation
- If this change adds system parameters or settings, update those as well.
- If this change affects EDI processes, update those EDI processes as well.
- If this change requires implementation from Aptean staff in order to be enabled, reflect that in the documentation.
- If this change affects a general process, update that process documentation as well.

In general:

- If the screen documentation doesn't come up to the standards required, fix it as you edit.
- Change screenshots where required.

For example:

- The change adds a flag to Carriers on the screen, plus a new system parameter.
- The new flag can be imported.
- The result of these changes is to affect the scheduling engine.
- The change is release in ER47-189.

Your actions:

- Each change is added noting the release number in the change documentation.
- You update the carriers screen with the new field. You update the screenshot. You notice that some other areas are missing and update those.
 - ◆ Change comment "ER47-189 - Added X field and updated in general."
- You update the list of system parameters with your new parameter and description.
 - ◆ Change comment "ER47-189 - Added new system parameters for X"
- You update the import affected with the new field.
 - ◆ Change comment "ER47-189 - Updated Y import with new field X."
- You update the scheduling engine process documentation to show the affects of this change. You ensure that the system parameter that controls this is reflected in both the documentation and in any list of applicable system parameters within the guide. If one does not exist, you create it.
 - ◆ Change comment "ER47-189 - Added details of X functionality."

For example:

- You create a new Quarantine screen for CTMS, and this affects and is affected by changes in other systems (e.g. MCS).
- It is affected by various existing and new system parameters.

Your actions:



- Create a new page for the Quarantine screen.
- Create a redirect for the form name in CTMS.
- You add this Quarantine page to the appropriate overview guide (through categorisation).
 - ◆ You should look for examples of other pages and ensure that the appropriate categories are added.
 - ◆ In this case, as this is part of the Maintenance menu, you would add this to the Maintenance guide, the User Guide and to the Modules guide. That will ensure that the page is added to the guides when exported to PDF. Example:

```
<noinclude>
[[Category:Maintenance|150]]
[[Category:C-TMS Modules|D-150]]
[[Category:C-TMS User Guide|BD-150]]
</noinclude>
```

- You ensure that documentation for MCS is released and updated as well (it may not be you doing it, but it's your responsibility to make sure it's all done).
- As this is a brand new process, you create a new user guide for this as well, describing how this affected across all systems.
 - ◆ For example: "CALIDUS Quarantine User Guide".
 - ◆ If there are pages you want to pull in across systems, you can do this through interwiki links - see here: [Interwiki](#).
 - ◆ This would be formatted as a formal Apteian document. Example: [ctms:UG_CTMS_LogiNext_Interface_Guide](#)
 - ◆ You may decide not to use the existing full page but just the screenshot. You do not need to create the screenshot again, just link to the existing screenshot.
 - ◆ You may decide that the MCS changes do not need to be documented here, but just referenced. You can do that using interwiki links to the documentation within the other Assists.

23.3.3 Customer-Specific Documentation

In general, our product documentation is exactly that - PRODUCT documentation, not customer-specific.

Any change that we undertake, whether product or customer change, is considered product, and should be documented as such.

This is accessible and visible to all of our customers, so we should steer clear of documents that mention specific customers.

Examples of good generic documentation

Bad

Stapletons

Stapletons Scheduling Engine

From time to time, a customer may ask us to create specific documentation for them. This is a chargeable task.

Good

Tyre transport operation

Fixed Drop Scheduling Engine

We should ONLY host that customer-specific documentation within the product Assist instance if

- the customer is aware that this will be visible to ALL Apteian Calidus customers.
- the customer agrees to this.

Regardless, customer-specific documentation does have a place in Assist. For example, these process-style documents are incredibly useful for project handover to support. So in that instance, they should exist within the (Apteian internal only) Calidus HUB Assist instead.

There is no issue with FAQs being put up within Product Assist instances, as long as they are removed of any customer names or true specificity, or the customer has agreed that this will be visible to other customers.

23.3.4 Customer Support Agents

Customer support agents are updated based on the PDFs extracted from the product Assists.

When product documentation is updated (i.e. on release of software to a customer), standard guides for that product should be updated and produced.

These guides should be stored in the SharePoint folders for the products in R&D CALIDUS Documents:



- CTMS/MCS/T2A -
<https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20TMS/Training%20Gu>
- PORTAL -
<https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20Portal/Development/>
- VEhub -
<https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20VEHUB/Documentati>
- EPOD -
<https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20ePOD/Training%20G>
- WMS/Bay Diary/TCM/ToC -
<https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20WMS/Training%20G>
- CAL-E -
[https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20WMS%20\(London\)/U](https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20WMS%20(London)/U)
- WCS -
<https://apteanonline.sharepoint.com/:f:/r/teams/RDCALIDUS/Shared%20Documents/CALIDUS%20WCS/Training/Trainin>

When this is done, the support agents will be updated with the new knowledge within a day.

23.4 How much is this going to help?

By following this process, you have updated the affected pages (screens, processes, etc) only once.

These pages and screenshots are re-used and applied into ALL documentation.

This reduces fragmentation and increases reusability, and therefore reduces the time taken to produce all documentation across all systems for everyone.

The systems can directly link to the Assist pages you created and updated directly from the UI, meaning that the user has direct access to the latest documentation, not waiting for a published PDF to be provided to them or custom documentation being written with single-use scenarios. This reduces support calls and implementation time.

The old system of documents piling up for each customer isn't relevant any more - they can download the equivalent documents direct from the Assist. So no updating many documents because of a single change or hunting for the "latest document that was created when we last did this, but not that one because it's too specific".

As you are creating technical documentation as well, but also linking to customer facing documentation, you are providing an easier understanding path for other Apteon resources and departments to be able to understand, test and implement your change, not just one person who wrote a requirements document.

You are reducing inter-department calls and handover times - because quality technical and user documentation exists, you will not be pestered multiple times by testers, implementers and customers. We can all use the documentation to answer our own questions.

As everyone is responsible for updating and checking documentation, there is less chance that undocumented features are present, and any poorly-described functionality is refined by multiple hands, improving the quality of the documentation for the systems.



24 Creating articles for inclusion in a PDF Book

This page is intended to help with the automated production of PDF Books from the Assist pages.

There are two ways of creating a PDF document:

- As a single page
- As a book - generated from multiple categorized pages.

24.1 Single Page

For a single page, use the templates provided [here](#). These are designed to help you create new pages or documents, using templates to make the documents work properly.

24.2 Creation of a Book

- Create a title page, as the Document title plus the word "Title" on the end. The page can be created using the template provided. In addition, the footer must be configured on this page, utilising comments. For example:

```
{{Doc_Title|System=Calidus ''Vision''|Title=Vision Coding and Release|Reference=236343|Version=1.0|Date=9th
```

- Add this and all pages to be printed as part of the PDF book to a category of the same name, for example:

```
[[Category:Vision Coding and Release Doc|000]]
```

Note that the Category Sort value should be set to 000 for the title page. All other articles included in the document should have a sort value assigned to them to indicate the position in the document.

- If required, create an appendix page. This [Template](#) can be used as an example. This page should be named as the document title plus the word "Appendix" on the end. Note that the Category Sort should be set to 999 or ZZZ (last in the list of pages).
- Create the Category page as in the following example:

```
=Vision Coding and Release=
This category encompasses pages that collate technical information of how the system is built and installed.
[{{fullurl:{{FULLPAGENAME}}|action=pdfbook&notitle}} Download this selection of articles as a PDF book.]
```

24.3 Production of the PDF

Click the link on the category entry created above, or click the Download/Print as PDF link in the toolbar from the category or from the single page.

24.4 Setup Requirements

See [Assist PDF Production Code](#) for details, but the PDF Book extension should already have been enabled in all Assist instances for you.



25 Creating new documents from templates

You can create new documents using the links on the following page:

- [Create New Page](#)



26 Creating a new Wiki installation

Warning: This page has been superseded by [Assist Upgrade Actions](#). See there for more information. However, this old version might contain some useful information, so is preserved.

26.1 Initial Setup

- Copy an existing WIKI folder to a new folder and rename to your Wiki.
- In this folder:
 - ◆ Rename the LocalSettings.php to *.old.php
 - ◆ Remove config/LocalSettings.php

26.2 Configuration

Connect to the site in a browser, and click the 'Set up the Wiki' link to configure and enter all the details required:

26.2.1 Site config

- Wiki name: Must not be blank or "MediaWiki" and may not contain "#". Enter the Product name here e.g. WCS, EPOD, TTM, etc
- Contact e-mail: Your email address.
- Language: en
- Copyright/license: No license metadata
- Admin username: Usually this is set to <wiki>_owner
- Password: Any password you like, but don't forget it. The password cannot be the same as the username.
- Object caching: No caching

26.2.2 E-mail, e-mail notification and authentication setup

- E-mail features (global): Enabled
- User-to-user e-mail: Enabled
- E-mail notification about changes: Enabled for changes to user discussion pages, and to pages on watchlists
- E-mail address authentication: Enabled

26.2.3 Database config

- Database type: MySQL
- Database host: localhost
- Database name: <wiki>_assist
- DB username: <wiki>_owner
- DB password: Any password you like, but don't forget it.
- Superuser account: Use superuser account if you have it
- Superuser name:
- Superuser password:

26.2.4 MySQL-specific options

- Database table prefix: <wiki>_
- Storage Engine: InnoDB
- Database character set: MySQL 4.1/5.0 binary

Click the **Install MediaWiki** button to create the configuration file.

Once complete, copy the config/LocalSettings.php to the root directory of this new wiki.

26.3 Further Configuration

Edit the LocalSettings.php file created above and paste the following at the bottom of the file:

```
# Restrictions
```



```

#Restrict anonymous editing
$wgGroupPermissions['*']['edit'] = false;
# Prevent new user registrations except by sysops
$wgGroupPermissions['*']['createaccount'] = false;
# Add permissions to autoconfirmed users
$wgGroupPermissions['creator']['delete'] = true;
$wgGroupPermissions['creator']['autopatrol'] = true;
# True Anonymous access
$wgShowIPinHeader = false;

# Settings for PDFBook
require_once( "$IP/extensions/PdfBook/PdfBook.php" );
$wgPdfBookLeftMargin = "2cm";           #Left page margin
$wgPdfBookRightMargin = "2cm";         #Right page margin
$wgPdfBookTopMargin = "2cm";           #Top page margin
$wgPdfBookBottomMargin = "1cm";        #Bottom page margin
$wgPdfBookFont = "Arial";              #Default font to use if unspecified in content
$wgPdfBookFontSize = "11";             #Point size of default font
$wgPdfBookLinkColour = "217A28";      #Colour to use when rendering hyperlinks in text
$wgPdfBookTocLevels = "2";            #Number of outline levels to use when building the table of content
$wgPdfBookExclude = empty List of article titles which should not be included in the book

# Settings to get the Help extensions working
require_once( "$IP/extensions/ParserFunctions/ParserFunctions.php" );
#$wgPFEnableStringFunctions = true;
require_once( "$IP/extensions/NumberFormat/NumberFormat.php" );

# Settings to enable SVG - doesn't work
#$wgFileExtensions[] = 'svg';
#$wgAllowTitlesInSVG = true;

# WikiForum settings
#require_once( "$IP/extensions/WikiForum/WikiForum.php" );

# Document Approval settings
#require_once( "$IP/extensions/DocumentApproval.php" );

# MakeArticle settings
require_once( "$IP/extensions/makearticle/makearticle.php" );

# CreateArticle settings
require_once( $IP . "/extensions/CreateArticle.php" );

#Collapsible Text settings
require_once( "$IP/extensions/JSpoiler.php" );

#UDEF Variables settings
require_once( "$IP/extensions/Variables/Variables.php" );

#WYSIWYG editor
#require_once( "$IP/extensions/FCKeditor/FCKeditor.php" ); //works but it breaks the Special:Version page

# Settings to get full error details from Wiki
$wgShowExceptionDetails = true;

#Display Webpages in Wikis
include( "extensions/anywebsite.php" );

$wgCopyrightIcon = "<a href=\"http://www.obs-logistics.com\" target=\"_blank\"><img src='/calidus-assist/W
# Default User Options for new users:
$wgDefaultUserOptions['forceeditsummary'] = 1;

```

Change the existing `$wgEnableUploads` variable to true.

Change the existing `$wgDefaultSkin` variable to 'vector'.

Change the existing `$wgPasswordSender` variable to your email address.

Save the `LocalSettings.php` file.

You can now log on to the new wiki as the admin user you created earlier.



26.4 Creating the basic content

Edit MediaWiki:Common.js (index.php?title=MediaWiki:Common.js&action=edit or just search for MediaWiki:Common.js) and add the following:

```

mwCustomEditButtons.push({
  "imageFile": "images/Button_enter.png",
  "speedTip": "Line break",
  "tagOpen": "<br />",
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_upper_letter.png",
  "speedTip": "Superscript",
  "tagOpen": "<sup>",
  "tagClose": "</sup>",
  "sampleText": "Superscript text"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_small.png",
  "speedTip": "Small",
  "tagOpen": "<small>",
  "tagClose": "</small>",
  "sampleText": "Small Text"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_gallery.png",
  "speedTip": "Insert a picture gallery",
  "tagOpen": "\n<gallery widths=600px heights=350px perrow=1>\n",
  "tagClose": "\n</gallery>",
  "sampleText": "Image:CTLTMS_Example1.PNG|'Caption1'\nImage:CTLTMS_Example2.PNG|'Caption2'"
});

var today = new Date();
var monthNames = ["January", "February", "March", "April", "May", "June",
  "July", "August", "September", "October", "November", "December"
];
var stndrdth = ["th", "st", "nd", "rd", "th", "th", "th", "th", "th", "th"];
var dayth = today.getDate() % 10;
mwCustomEditButtons.push({
  "imageFile": "images/Button_CoverPage.png",
  "speedTip": "Insert an Document Title Page",
  "tagOpen": "{{Doc_Title\n|Client=ClientName\n|System='CALIDUS' System\n|Title=Doc Title\n|Referen",
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_LastPage.png",
  "speedTip": "Insert an Document Final Page",
  "tagOpen": "{{Doc_Appendix|\nAppendix=The Appendix Section. Defaults to A\n|Glossary=WCS|WMS|CTMS.",
  "tagClose": "\n}}\n",
  "sampleText": "<!-- The following may also be added -->\n|Estimate=Enter Y if an estimate section i
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_blockquote.png",
  "speedTip": "Insert an Estimate template",
  "tagOpen": "{{EstimateCostDetails\n|REQ=Requirements Days\n|EST=Estimation Days\n|FS=Functional Spe",
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_test_header.png",
  "speedTip": "Insert a test plan template",
  "tagOpen": "{{TestPlan_Header\n|Title=Title of test plan\n|Log=Supimix log reference\n|Description=",
  "tagClose": "\n{{TestPlan_CycleFooter}}\n",
  "sampleText": "<!--INSERT TESTS HERE -->"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_test_header.png",

```



```

    "speedTip": "Insert a test plan cycle",
    "tagOpen": "{{TestPlan_CycleHeader\n|Cycle={{ #vardefineecho: Cycle | {{ #expr: {{ #var: Cycle }} +
    "tagClose": "\n{{TestPlan_CycleFooter}}\n",
    "sampleText": "<!--INSERT TESTS HERE -->"
  });

mwCustomEditButtons.push({
  "imageFile": "images/Button_test_add.png",
  "speedTip": "Insert a new test",
  "tagOpen": "{{TestPlan_Test\n|Test={{ #vardefineecho: SubCycle | {{ #expr: {{ #var: SubCycle }} +
  "tagClose": "",
  "sampleText": ""
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_insert_table.png",
  "speedTip": "Insert a table",
  "tagOpen": '{| class="wikitable" border="1"\n|- bgcolor="silver"\n',
  "tagClose": "\n|\n",
  "sampleText": "! header1 !! header2 !! header3\n|-\n| cell1 || cell2 || cell3"
});

mwCustomEditButtons.push({
  "imageFile": "images/Button_comment.png",
  "speedTip": "Insert a comment",
  "tagOpen": '{{comment|text=',
  "tagClose": "\n|sign=[[User:"+wgUserName+"]] |date="+today.getDate()+"/"+(today.getMonth()+1)+"/"+today
  "sampleText": "Your Comment Here"
});

```

Edit [MediaWiki:Vector.js](#) ([index.php?title=MediaWiki:Vector.js&action=edit](#) or just search for [MediaWiki:Vector.js](#)) and add the following:

```

window.onload = function (e) {
  document.getElementById('mw-panel').style.position='fixed';
}

```

Export the following pages and files from an existing Wiki:

- Pages

```

Template:Note
Template:Warning
Template:Meta
Template:Clear
Template:H12
Template:H13
Template:Prettytable
Template:!
Template:Comment
Template:Doc_Appendix
Template:Doc_Title
Template:EstimateCostDetails
Template:TestPlan_CycleFooter
Template:TestPlan_CycleHeader
Template:TestPlan_Header
Template:TestPlan_Test
Template:Estimate_Head
Template:WCS_Glossary
Template:WMS_Glossary
Template:EPOD_Glossary
Template:CTMS_Glossary
Template:FS
Template:Estimate
Template:REQ
Template:DocLink
Help:Contents
Help:PDF_Book
Help:CreateNewPage

```

- Files:

```

OBS_Logistics_Logo.JPG

```



Bulbgraph.png
Attention_niels_epting.png

Import the pages into the new Wiki through the Special:Import page.

Upload the images into the new Wiki through the Special:Upload page.

The Wiki should now be ready for use.

26.5 Creating Users

Create users using Email - they will then become autoconfirmed users.

Any users you don't want to track edits (i.e. non-patrolled), add them to the Creator group.



27 Upgrading the version of an existing Wiki installation

Warning: This page has been superseded by [Assist Upgrade Actions](#). See there for more information. However, this old version might contain some useful information, so is preserved.

Note: The latest validated version of MediaWiki that works with Assist is 1.16.5.

Note: Although later versions may work, it is expected that the PDF export (required for most of the Assist pages) will eventually break, due to CSS being introduced in more modern versions.

27.1 Software Required

- MySQL Administrator (root access)
- php (part of MediaWiki)
- The full MediaWiki archive file, from here:
 - ◆ Current versions: <https://www.mediawiki.org/wiki/Download>
 - ◆ Old versions: <https://releases.wikimedia.org/mediawiki/>

27.2 Prior to Upgrade

- Back up the database schema being affected.
- Back up the installation for the wiki being upgraded.

27.3 Upgrade

Full upgrade instructions related to your version of MediaWiki are in the folder as a file called UPGRADE. Follow these instructions

Essentially it involves running

- `php /maintenance/upgrade.php`

Note: php is part of MediaWiki. you may need to directly point to the php exe in the main MediaWiki folder.

Note: Ensure that the `<wiki>_owner` account has full access to create and alter schema properties, or updates will fail.




28 Editing a document

28.1 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.

28.2 Document Editing

When you find a page that needs editing, you can do it in one of two ways:

- Source Editing - typing in plain text with WikiText markup language - not too complicated, but a bit of a barrier for new users. Click the *Edit Source* button to start source editing.  **Note:** Source editing is stored in the browser, but will not persist if you close the browser. That makes it easy to lose a lot of changes if you are editing in source editor. Visual Editor changes will persist - it will remember your last changes in the session (as long as the session is still there!). So it's a lot harder to lose your changes between sessions with Visual Editor (as well as being a lot easier to use). You should only use Source Editing for certain things (like manually making small changes, adding "noinclude" tags, making a table searchable, etc - these exceptions are all called out below).
- Visual Editing - like a simple version of your favourite document editing application. You can do most things (but not all) with Visual Editing. Click the *Edit* link against a page to start Visual Editing.

You can also flip between visual and source editing when you're in there, so don't worry if you clicked the wrong one.

This guide will show you how to do everything here in each of the editing methods, to help reduce those barriers and make documentation easier.

28.3 Source Editing

WikiText markup can seem daunting, but it's not meant to be. This guide won't try and describe everything that you can do with WikiText markup, but will describe how the tools can make it easier to do.

This section will introduce you to the source editing toolbar and some basic concepts.

When source editing you will have a toolbar for basic edits. So start typing, and when you want to format something, you can use the toolbar.

If I want something in **bold**, I click the **Bold Text** button - the WikiText markup will be put in the editing window for me, with the text in between the markup ready for editing.

The same is true for:

- *Italic text*
- Headings (level 2-5)
- Bulleted lists (like this one) or

1. Numbered list items like this one

- No Wiki formatting (turns off WikiText markup, hugely useful when writing a guide like this one!)
- New Line
- **Big text** or Small text
- ^{Superscript text} or _{Subscript text}
- Links to other pages, like [Did You Know](#).
- Code.
- "Noinclude" tags.

You can also highlight the text you want to format and then click the button - the editor will tag the text you highlighted.

You have a **Preview** button - this shows you what your WikiText changes look like in real formatting in near real time. You can't edit it there, but it's useful to see you're getting it right.



Other essential page formatting is more complicated:

Tables can be inserted easily enough using the **Table** button. Click the button, choose your number of columns and rows (and any properties of the table, like sortable) and click **Insert**. The editor will insert the table for you in shorthand, like below:

Caption text

Header text Header text Header text

Example Example Example

Example Example Example

Example Example Example

Then you can edit it. We typically do not use captions, so you could remove that line if you want. To change the cell content, simply change the text between the vertical bars (or exclamation points, if it's the header row).

Tables also support being searchable - it's not a property that is supported by the Table tool, so you have to edit it in yourself using the source editor.

- Add "apt-searchable" to the table class

```
{| class="wikitable apt-searchable"
```

- You can then make rows non-searchable by adding a class to the row "|-" element as follows:

```
|- class="non-searchable"
```

Images are covered in a following section.


28.4 Visual Editing

Visual editing formats the text like it would do on the final page (in most cases). It's almost completely invisible to you as an editor that in the background this is generating the WikiText markup for you, so makes it much easier. There are however some things that the Visual Editor can't do which source editing is very useful for.

This section will introduce you to the visual editing toolbar and some basic concepts.

When visual editing you will have a toolbar for basic edits. So start typing, and when you want to format something, you can use the toolbar or the provided shortcuts.

If I want something in **bold**, I click the **Style Text** button and choose *Bold* or press `CTRL-B` - the text I type will be in bold from now on. You can turn it off in the same way.

 **Note:** The visual editor can use keyboard shortcuts, and the editor will tell you the shortcut keys next to the toolbar option you are selecting, if there is one.

Standard shortcut keys are also supported, like cut/copy/paste:

- `CTRL-X` - Cut.
- `CTRL-C` - Copy.
- `CTRL-V` - Paste (formatted).
- `CTRL-SHIFT-V` - Paste (plain text).

Additional formatting:

- `CTRL-I` - *Italic text*
- **Big text** or Small text
- Superscript text or Subscript text
- Computer code formatting
- `CTRL-U` - Underline



and many more.

You can also highlight the text you want to format and then click the button - the editor will tag the text you highlighted.

Similarly with links to other pages, like [Did You Know](#). Either click the Links button in the toolbar, enter the page name and click **Done**. You then have the opportunity to edit alternative text directly over the link. The same is true for an existing link when you click on it.

Bullets and numbered lists (and indentation) can be accessed from the **Structure** button.

- Bulleted lists (like this one). There's no shortcut key, but you can start a bulleted list by entering an asterisk followed by a space.
- 1. Numbered list items like this one. There's no shortcut key, but you can start a numbered list by entering a number followed by a full stop and a space. Or a hash symbol followed by a space for a new numbered list.

Paragraph formatting can be accessed from the **Paragraph Formatting** drop-down list in the toolbar.

- Headings (level 2-5)
- Preformatted Code formatting
- Centre text

and many more.

Warning: You currently can't mark anything as `nowiki` formatting, or as `noinclude`. Sorry - you have to use the Source Editor for that.

You have undo and redo buttons (and their normal shortcut keys (`CTRL-Z` and `CTRL-Y`)).

If you are familiar with WikiText markup and start typing in the syntax from WikiText (like `{{` to insert a template), the Visual Editor is going to recognise that and either format the text or popup the dialogue associated to that WikiText markup - in the example above, it will open up the *Insert Template* dialogue for you, so the markup can be used as shortcuts in most cases. It doesn't work for bold and italic or images, but pretty much for everything else, so handy to know.

If you paste WikiText markup from source editing into the Visual Editor, it will convert the text for you, rather than see it as plain text - super useful when copying between pages.

Other essential page formatting is more complicated:

Tables can be inserted easily enough using the **Insert** button and selecting *Table*. Click the button and a table is inserted into the page.

You can use the buttons to add columns and rows. You can also edit the properties of the table with the **Properties** button, for example, to get rid of the caption if you don't want it.

Editing the contents of the table is directly in the cells themselves - much easier.

Warning: Unfortunately, you can't (yet) add searchable tables through the visual editor. You should switch to source editing to add this functionality.

Images are covered in a following section.

28.5 Standards

To maintain a fairly standard set of documentation, use the following guidelines:

- Buttons should be in **Bold**.
- Tabs and menu options should be in *italics*.
- Keyboard shortcuts or code should be in `Code` or `Preformatted` format.



- Leave two lines between sections.
- Use templates - see [Templates](#) section below.
- Reuse documentation where possible - if there is already a page describing how to use or do something, include that page - see [Transcluding](#) below.

28.6 Images

Images must be uploaded to be used in pages, which is a bit of a pain, but really aids in reusability of images.

Warning: Bear in mind that, with either Source or Visual editing, you can't trim or edit the image when it's uploaded, so make sure what you're uploading is what you want to see in the final document.

Warning: Be very wary of using scalable graphics formats, such as SVG. Although they look fine in the web pages, the images do not render in the PDF print at this time.

When source editing:

These images need to be saved first.

Easiest is to use an image editing application such as MS Paint, which makes this fast and easily editable.

- Take a screenshot of your screen (CTRL-PrtSc) or the active window (ALT-PrtSc).
- Paste into Paint.
- Crop and Save to a local file - use PNG format by preference.

Alternatively, use the Windows Snip and Sketch tool to do the same.

Clicking the **Image** button will show a dialogue to enter:

- *Filename:* enter a filename for an image that has been uploaded, or enter a new name. Keep it relevant, like "VEhub_Login.PNG"
- *Caption:* optional
- *Alternative text:* optional
- *Size:* optional, but any image that you are uploading that is greater than 1000px wide should be reduced to that or 800px, to make them fit in the PDF when produced.
- *Align:* *Left*, *Center*, *Right* or *None*.
- *Format:* Choose *None*.

You have an **Upload** button here, so you can upload the image you have already saved to your PC.

When visual editing:

You have lots of options to create a new image.

- You can take a screenshot of a screen or window as above or copy an image from a document or filesystem, then just paste (CTRL-V) in the editor - the *Image* dialogue will appear, showing a thumbnail, allowing you to name the image, then edit any properties. Steps:
 - ◆ Paste the image - the image popup will appear.
 - ◆ The image will initially be named "image.png" - that's OK, as we will change it in a minute - Check "This is my own work" and then click **Upload**.
 - ◆ Enter a name - make sure that this is unique and relevant, , like "VEhub_Login.png" or "Tesla Order Search 1.png".
 - ◆ Enter a description - the dialogue forces you to enter a description - you could just copy in the filename, or (preferably) enter a description, maybe also a unique ID like the screen name.
 - ◆ Click **Save** - the properties box will be displayed - see below..
- You can drag and drop a local image from your PC straight to the window. When you drop it, the *Image* dialogue will appear, showing a thumbnail, allowing you to name the image (which will default to the name of the file being uploaded). From that point, it's similar to the above process, of uploading, naming, saving and editing properties.



- You can choose images you have recently uploaded by selecting the **Insert** button on the toolbar and selecting *Images and Media*. You can then select the image from the *Search* tab, select it, click **Use this image** and then amend the properties. This is super-useful when combined with batch uploading of images (below).
- You can choose to re-use images that have already been uploaded onto the Assist by anyone - select the **Insert** button on the toolbar and selecting *Images and Media*. You can then search for images by their name from the *Search* tab. When you find an appropriate image, you can select it, click **Use this image** and then amend the properties.
- You can directly upload a saved image by selecting the **Insert** button on the toolbar and selecting *Images and Media*. You can then select the image from the *Search* tab and then amend the properties.

The properties you can edit are:

- *Caption*: optional
- *Alternative text*: optional
- *Position*: Left, Center, Right or None. Choose Center or None. It will turn itself off if you select a Basic image.
- *Image Type*: Choose Basic.
- *Image Size*: optional, but any image that you are uploading that is greater than 1000px wide should be reduced to that or 800px, to make them fit in the PDF when produced.

Then you can insert the image.

For updating an image that already exists, however, your options are more limited. It's important that we update images, rather than upload new ones. If you attempt to paste in an image and call it the same thing as something that already exists, Visual Editor will throw an error.

To update the image, you have to save as a picture file first:

- From a Word document, right-click, Save as Picture, give it a name and save.
- From printscreen, paste into your paint application and save as PNG.
- From Snip and Sketch, save as PNG.

You can then:

- click on the image link and upload a new version from the upload page.
- click *Upload File* from the Wiki Tools toolbar on the left and upload a new copy.
- batch upload the file - see below for details.

Regardless of which editor you are using, you also have the ability to batch upload images. So, if you have created all the images you need and named them appropriately, you can upload those images using the Special page "*Upload Multiple Files*". From there, you can drag and drop or multi-select all of your images into the system, then use them in your page.

- Save your images to local files in a unique and reasonable filename - if it's reusable for other things, make them relevant, as above.
 - ◆ From a Word document, right-click, Save as Picture, give it a name and save.
 - ◆ From printscreen, paste into your paint application and save as PNG.
 - ◆ From Snip and Sketch, save as PNG.
- Go to the Assist Special pages
- Select *Upload Multiple Files*
- Enter a description if you want - it's optional, but can be useful. For example, if uploading a load of images relating to a Tesla Support document, you might enter "Tesla Support Images". But you can also leave this blank - that's perfectly fine.
- Either
 - ◆ Select all your images in a Windows explorer and drag and drop to the appropriate place on the page
 - ◆ Click the button, multi-select from the popup explorer and confirm.
- The files you selected will be shown in a list on the page.
- As they are uploaded, they will change colour to show whether they uploaded successfully or not
 - ◆ If they turn green, all good.
 - ◆ If they turn red, they didn't upload - check the error reason and correct.
- **Warning:** Uploading a file that already exists will create a new version of that file - you should check where this image has been used before and make sure that the image you have uploaded is appropriate to all pages that use it.



28.7 Templates

Where possible, the templates created for you should be used when creating and within the document.

We use Templates when we want a consistent look to certain things, from simple things like a notation, to more complicated things like a full document.

You can add templates quite easily:

- Source Editing:
 - ◆ Just type in double-curly bracket notation like `{{Warning}}`
 - ◆ Or Click the **Template** button, type the name or part of the name of the template you want to use, for example "War" then select it and **Insert**.
- Visual Editing: click the **Insert** toolbar option, then *Template*. Type the name or part of the name of the template you want to use, for example "War" then select it and **Insert**.





Some more complicated templates have parameters that can be passed to them. In the example above, "Warning" can accept a single parameter of the warning text itself. It's optional in this case, but some really complicated templates (like Doc Title) have lots that are required to be entered - you use it like this:

- Source Editing:
 - ◆ With positional parameters, just vertical bar delimit the parameters like so: `{{Warning|My warning text}}`
 - ◆ Some templates support named parameters, like so:

```
{{Xref
|Type=Example
|Num=1
|Text=The text describing the cross-reference
}}
```

- ◆ Or Click the **Template** button, type the name or part of the name of the template you want to use, for example "War" then select it. You can then enter the parameters and **Insert**.
- Visual Editing: click the **Insert** toolbar option, then *Template*. Type the name or part of the name of the template you want to use, for example "War" then select it. You can then enter the parameters and **Insert**.

Some simple templates:

- Note - This provides a note graphic  **Note:** like so
- Warning - This provides a warning graphic  **Warning:** like so
- Hint - this provides a hint note  **Hint:** Like so.
- Xref - this provides a cross-reference in a standard format. Use it like so: `{{Xref|Type=Image|Num=1|Text=An image of something}}`
- Incomplete - this adds a warning that the document is incomplete, and adds the document to an Incomplete category, so it can be easily found and completed. Use it like so: `{{Incomplete}}`
- Generic glossaries have been provided for the *CALIDUS* products -
 - ◆ You will find them in the **Glossaries** category.
 - ◆ These can be added to and amended if required by clicking on the glossary template in the editing screen.
 - ◆  **Note:** All Glossaries are now maintained in this Assist, the Calidus HUB. That means that you can add them to your pages or documents or refer to them, but they are all referred to as part of the "obs" namespace. This is a special bit of functionality known as Interwiki, and is dealt with below.
- 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

Some complicated templates:

- Doc Title - creates a document title page.
- Doc Appendix - creates a document appendix page.



Some full document templates: Document templates have been produced for the following document types:

- Requirements
- Estimates
- Functional Specifications
- Small Change Requests
- Test Plans
- ERs
- Patches

and many more.

Full document templates can also be accessed through the [Help:CreateNewPage](#) page.

The links on that page will help you generate a new document or page.

- Enter the title of the page or document you are creating in the right entry box for the document that you want to create.
- Click the button.

The system will copy everything required in the template into a brand new page created for you, so that you can complete editing it.

There are pretty extensive guides in the [Assist](#) category on creating pages (specifically release notes) from Templates - it is advised that you look there for more information.

28.8 Transclusing

Transclusion is all about re-using pages that you have already created. We can (and should) do this, as "edit once, edit everywhere" applies, meaning that the pages are updated in every other page or category that uses them, massively reducing the amount of effort required to get changes into the right places.

Say for example, you have documented the Resource Allocation process in a page called "Allocate Resources". That screen is called from the Planning Screen and from the Waterfall screen, which are also documented. You want to describe resource allocation in the documentation of those pages, but you don't want to have to type it all in again, or have to keep updating multiple pages because a small change has happened to that Resource Allocation screen. You could just add it as a link, for example, "see Allocate Resources for more information", but you really want a complete document here. Transclusion helps here.

In the Planning page, you add a Header for "Allocating Resources"

- Source Editing: `== Allocating Resources ==`
- Visual Editing: Choose the *Heading 2* format from the toolbar and type "Allocating Resources".

Then we can transclude the page:

- Source Editing: `{{:Allocating Resources}}`
- Visual Editing: On a new line, click the **Insert** toolbar option, then *Template*. Type a colon, followed by the page e.g. `:Allocating Resources`, then select it and **Insert**.

That's it - the page will be included at that point in your Planning page. Whenever Allocating Resources changes, the planning page will also update.

You can see wherever a page is included or linked to in any other pages really easily. Click "*What links here*" in the "*More*" toolbox section. That will show you a list of all:

- *Transclusions* - directly used in a page.
- *Redirects* - stub pages that immediately redirect to this page
- *Links* - just a link has been added.

That way, when you edit a page, if this edit fundamentally affects a document that is produced from those linked pages, you can edit those if necessary, perhaps to increment a version or modified date, if these pages are producing a PDF



book.

28.9 Interwiki

As you know, the Assist systems are based on MediaWiki, then engine that powers Wikimedia.

Each product has its own instance of this, so we have Assist (wiki) instances of (amongst others):

- OBS - Calidus HUB
- MTS - Calidus TMS
- WCS - Calidus WCS
- WMS - Calidus WMS 3pl
- Portal - Calidus Portal (all types)
- MCS - Calidus MCS

In the interests of reducing duplication and possible out of date guides existing within other pages, each of these Assists can use pages out of the other Assists by using a defined interwiki reference.

What that means is you can link to or transclude ANY page from any other Assist, like you would for any page on your Assist.

So, the interwiki shortcuts are:

- Calidus HUB - "obs"
- Calidus TMS - "ctms"
- Calidus WCS - "cwcs"
- Calidus WMS 3pl - "cwms"
- Calidus Portal - "cportal"
- Calidus MCS - "cmcs"

Essentially, you use the Interwiki prefix before the page or template you want to use.

- To use a template from another wiki, the syntax is `{{iw:TemplateName}}`.
- To link to a page from another wiki, the syntax is `[[iw:PageName]]`.
- To transclude a page from another wiki, the syntax is `{{:iw:PageName}}`.
- To use an interwiki link for a DocLink, the syntax is `{{DocLink|iw:PageName}}`.

As mentioned above, Glossaries for all systems are maintained within the Calidus HUB Assist. The page exists in the local wiki, but it transcludes the Calidus HUB version. So, you can continue to use the template `{{WMS Glossary}}` as normal. But you could also use `{{obs:WMS Glossary}}` instead and get the same result.

Best use cases for Interwiki functionality are:

- Repetitively-maintained and used data, for example Glossaries.
- Technical guides linking to customer-facing guides, for example on this wiki [CTMS Paragon Interface](#), where the customer-facing guide maintained in the CTMS Assist is both linked to and transcluded.
- Product-specific pages linking to technical specs, for example, in WMS, you would find [PoD Guide](#), which links to the Port of Dover SDD on this Assist [SDD 350229 Port of Dover Solution Design](#) as a DocLink to download the PDF i.e. `{{DocLink|obs:SDD 350229 Port of Dover Solution Design}}`

In this way, we further promote the "write once, write everywhere" mentality and reduce effort, which providing a more connected, more up to date documentation set to our customers.

28.10 Categories

Categories are used to group pages together. A category can be used to see all pages in that category, and can also be used to produce a combined PDF book of all pages in that category.

You add categories like this if you are editing the source page: `[[Category:Assist Guides]]`



When using the Visual Editor, you can add Categories from the **Menu** button on the top-right of the Visual Editor toolbar, and click *Categories*.

Any categories already on the page will be listed here. You can remove them, or add to existing ones by searching for the category in the box, or even create new categories - the search box will suggest what to do as you type.

When adding pages to categories that are intended to form part of a PDF book, then we want the pages sorted in a custom way, as opposed to the default, which is alphabetical.

When editing source, you do this as follows:

```
[[Category:Assist Guides|A-099]]
```

Here, we are saying that this page should be sorted in the category as A-099. Other pages will be sorted similarly, and therefore will appear in the correct sequence.

For example:

You have several pages, and you want them in this order on a category "Accounts":

- Accounts Title
- Accounts
- Contracts
- Invoices
- Debrief by Invoice
- Service Offerings
- Internal Recharging
- Accounts Appendix

If these pages were just added to the "Accounts" without sorting like `[[Category:Accounts]]`, they would appear in this sequence:

- Accounts
- Accounts Appendix
- Accounts Title
- Contracts
- Debrief by Invoice
- Internal Recharging
- Invoices
- Service Offerings

So, what we should do is add them with a sort key, for example:

- Accounts Title - added as `[[Category:Accounts|000]]`
- Accounts - added as `[[Category:Accounts|100]]`
- Contracts - added as `[[Category:Accounts|110]]`
- Invoices - added as `[[Category:Accounts|120]]`
- Debrief by Invoice - added as `[[Category:Accounts|130]]`
- Service Offerings - added as `[[Category:Accounts|140]]`
- Internal Recharging - added as `[[Category:Accounts|150]]`
- Accounts Appendix - added as `[[Category:Accounts|999]]`

The numbering leaves sufficient room to insert more pages in the place that we want them.

A page might (and very much should) be part of several categories.

For example, the Accounts page above is a page that is used as follows:

- Part of the Accounts PDF book
- Part of the CTMS Modules PDF Book
- Part of the CTMS User Guide PDF Book

So that page can be categorised into multiple categories like so:

```
[[Category:Accounts|100]]
[[Category:C-TMS Modules|C-100]]
```



```
[[Category:C-TMS User Guide|BC-100]]
```

Warning: When you add categories to a page, and then you use that page in another page (see Transcluding), the other page will by default inherit the sub-page categories - we don't want this.

So, by default, categories should be included within a `<noinclude>...</noinclude>` tag, like so:

```
<noinclude>
[[Category:Accounts|100]]
[[Category:C-TMS Modules|C-100]]
[[Category:C-TMS User Guide|BC-100]]
</noinclude>
```

Pages that have been added to categories will be shown in the *Categories* section of the toolbar - clicking these links will take you to all pages in that category.

28.11 Saving your Changes

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.

Your comments should reflect the changes. It's good practice to reference any call numbers or system versions associated to the change of you know them. Avoid client names if you can - remember this is standard documentation! For example, for a Salesforce or DevOps change 123465 for customer ABC Travel, adding a new Customer Ref field to a screen, consider entering your comment as follows:

```
Added new Customer Ref field (123456)
```

As documentation should always be updated when software patches or releases are made available or released to a customer system, then consider using the ER/patch/release number in the comment, for example:

```
ER CTMS 047-101 - Added (some functionality) to the screen
```

When a document is going to be changed to a new version, you **should** change the version and date within the document, and add the version number to the start of the comment. For example:

- v0.02 - Draft issue for review
- v1.00 - Ready for Issue.

How this works is slightly different for each editor.

For Source Editing:

- Enter a summary comment.
- Check whether this is a *Minor edit*.
- Optionally you can *Watch this page* - if anyone edits it in the future, you'll get an email. You can manage your watchlist from user preferences accessed from your user name.

Once you have selected, you can do the following:

- **Save changes** - if you haven't entered a summary comment you will be reminded, or the changes will just be saved.
- **Show preview** - as you are probably using realtime previews, probably not required. If you do use it, the changes will be shown on the top of the page, but remember your changes have not yet been saved - use the **Save changes** button as above to commit them.



- **Show changes** - show all changes in text differences showing each line changed, added or modified in a list. Remember your changes have not yet been saved - use the **Save changes** button as above to commit them.

From Visual Editing:

- Click **Save Changes**
- You will be shown a popup - enter your summary here.
- Check whether this is a *Minor edit*.
- Optionally you can *Watch this page* - if anyone edits it in the future, you'll get an email. You can manage your watchlist from user preferences accessed from your user name.

You then have options.

- **Save changes** - if you haven't entered a summary comment you will be reminded, or the changes will just be saved.
- **Review your changes** - show all changes in differences. The changes will be shown in Visual mode with colour highlighting - you can switch to the text differences above as well if that suits you better. Remember your changes have not yet been saved - use the **Save changes** button as above to commit them.

28.12 Some Final Notes

Note:

- 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. See the following section on Categories.
- 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 toolbar.

28.13 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
- If you use the standard document template with the Doc_Title title page and you specify a version, when you download the PDF, the document will be appended with the version number automatically.
- 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.



29 Support Tools

The intention of this guide is to provide support information, and a general knowledge base and tips for the ongoing maintenance of Assist implementations.

29.1 Requirements

MySQL WorkBench

Access to the Assist server.

29.2 Hosted Systems

All hosted systems are documented in SharePoint, along with users and passwords.

You must have access to the SharePoint to read this document.

<https://apteanonline.sharepoint.com/teams/CALIDUS-CONNECTIONS/Shared%20Documents/Forms/AllItems.aspx?id=%2Fteam>

29.3 Updating Data En Mass

By default, MySQL will not allow updating of data without explicit WHERE or LIMIT clauses. To enable this:

- Go to "Edit/Preferences"
- Choose "SQL Editor" Under "Query Results"
- Check "Safe Updates"
- Restart MySQL WorkBench.

⚠ Warning: You will then be able to (for example) delete all data inadvertently, so enable this option with care.

29.4 Viewing BLOB fields

By default, MySQL WorkBench displays all text fields as "BLOB", which you must then right-click and choose "Open Value in Editor". To enable viewing the text directly in the results, do the following:

- Go to "Edit/Preferences"
- Choose "SQL Editor" Under "Query Results"
- Check "Treat BINARY/VARBINARY as nonbinary character string"
- Restart MySQL WorkBench.

💡 Note: Enabling this option comes with a performance hit - some text fields contain the entire page data, so enable this with care.

29.5 Recovering passwords from MYSQL Workbench

First go check where your encrypted file is. Usually it is stored at
%AppData%\MySQL\Workbench\workbench_user_data.dat

If different, amend the commands below.

Use Powershell



```
Add-Type -AssemblyName System.Security
$cipher = Get-Content $env:APPDATA\MySQL\Workbench\workbench_user_data.dat -Encoding Byte -Raw
$scope = [System.Security.Cryptography.DataProtectionScope]::CurrentUser
$mysqlpwd = [System.Security.Cryptography.ProtectedData]::Unprotect( $cipher, $null, $scope )
[System.Text.UTF8Encoding]::UTF8.GetString($mysqlpwd)
```

29.6 Common Queries

```
-- Assist SQL aimed at helping with queries

-- Find the page ID
SELECT * FROM obs_assist.obs_page
WHERE PAGE_TITLE LIKE '%SDD_366558%';

-- Find all revisions (to change comments)
SELECT * FROM obs_assist.obs_revision
where rev_page IN
(SELECT page_id FROM obs_assist.obs_page
WHERE PAGE_TITLE LIKE '%SDD_366558%'
);

-- Find unpatrolled pages to set them patrolled
SELECT *
FROM obs_assist.obs_recentchanges
where rc_patrolled = 0;

UPDATE obs_assist.obs_recentchanges
SET rc_patrolled = 1
where rc_user_text = 'StylesC'

-- Check the logs for details of PDF production
SELECT * FROM mts_assist.oh_logging
where log_action = 'PdfBook'
-- order by log_id desc

-- For v1.34 and later, comments have changed:
SELECT log.*, CONVERT(comment.comment_text USING utf8) comment
FROM epod_assist.epodlogging log
left join epod_assist.epodcomment comment
on comment.comment_id = log.log_comment_id
where log_action = 'PdfBook'
--ORDER BY log_id DESC
--LIMIT 20
```

29.7 Assist Database Backup

Backup each database separately.

Use MySQL Administrator Data Export option.

Always check boxes as follows:

- Dump Stored Procedures and Functions
- Dump Events
- Dump Triggers
- Export to Self-contained File
 - ◆ Name with the name of the Assist on the start of the dump.
- Include Create Schema

Advanced Options button

- Comments
- Create-options
- quote-names
- lock-tables



- dump-date
- disable-keys
- tz-utc
- add-locks
- extended-insert

Start Export

29.8 Assist Database Restore

If required, drop the database from MySQL Administrator:

- On Schema explorer, right click on schema and select Drop Schema.

Use MySQL Administrator Data Import/Restore option.

- Import from self-contained file
- Select the database backup dump
- Click Start Import
- Refresh the schema explorer when done - the database should be present.

Restore database users, passwords and permissions when complete.

Will need to create the assist owner with username and password from LocalSettings.php

- From MySQL Admin Management Explorer
 - Users and Privileges
 - Add Account
 - ◆ Login Name and Password - as per LocalSettings.php
 - Administrative Roles tab - check DBA, which checks everything
 - Schema Privileges - add entry
 - ◆ Selected Schema
 - ◆ Check everything (click Select 'ALL' button)
- Click Apply

Normal Assist users will need to be reset either by the users through 2FA, or through [#Resetting User Passwords](#).

29.9 Upgrading a Wiki from 1.16 Upwards

The following is a checklist of actions.

{SYSTEM}

- Extracted - INCOMPLETE
- DB Import - INCOMPLETE
- DB User - INCOMPLETE
 - ◆ {SYSTEM}_owner/{PASSWORD}
- Version 1.31.6 - INCOMPLETE
 - ◆ Move old extensions to old folder - INCOMPLETE
 - ◆ Recreate LocalSettings.php
 - ◆ Update password sender and emergency contact
- Version 1.34.4 - INCOMPLETE
 - ◆ Leave LocalSettings.php
 - ◆ May need to remove some extensions like numberformat and variables
- Version 1.39.8 - INCOMPLETE
 - ◆ Leave LocalSettings.php
- New Extensions and files - INCOMPLETE
 - ◆ Overwrite MW-add-files - INCOMPLETE
- LocalSettings.php - INCOMPLETE



- ◆ require_once "\$IP/LocalSettingsAdditional.php";
- Gadgets and MediaWiki css/js hacks - INCOMPLETE
 - ◆ Import MW-hacks.xml file - INCOMPLETE
- Templates - INCOMPLETE
 - ◆ Import MW-Templates.xml - INCOMPLETE
- Additional Files - INCOMPLETE
 - ◆ C:\Users\twalker\OneDrive - Aptean-online\Documents\Work\Assist\OBS Templates Export
 - ◇ Aptean_Logo.png
 - ◇ Attention_niels_epting.png
 - ◇ Bulbgraph.png
 - ◇ Hint.png
- About/General Disclaimer/Privacy Policy - INCOMPLETE
- Users - INCOMPLETE
 - ◆ admin/Liverpool123
 - ◆ anw/Liverpool123
- Problems
 - ◆ NONE

29.10 Creating a Brand New Wiki

The following is a checklist of actions.

- Copy version 1.39.8 to a WIKI name - INCOMPLETE
 - ◆ Create LocalSettings.php
 - ◆ xxx_owner with appropriate password
 - ◆ Note the password!
- New Extensions and files - INCOMPLETE
 - ◆ Overwrite MW-add-files - INCOMPLETE
- LocalSettings.php - INCOMPLETE
 - ◆ require_once "\$IP/LocalSettingsAdditional.php";
- Gadgets and MediaWiki css/js hacks - INCOMPLETE
 - ◆ Import MW-hacks.xml file - INCOMPLETE
- Templates - INCOMPLETE
 - ◆ Import MW-Templates.xml - INCOMPLETE
- Additional Files - INCOMPLETE
 - ◆ C:\Users\twalker\OneDrive - Aptean-online\Documents\Work\Assist\OBS Templates Export
 - ◇ Aptean_Logo.png
 - ◇ Attention_niels_epting.png
 - ◇ Bulbgraph.png
 - ◇ Hint.png
- About/General Disclaimer/Privacy Policy - INCOMPLETE
- Users - ensure that there is at least an Admin user with full user rights. Note the password:
 - ◆ Log in as administrative user
 - ◆ Special:Create Account
 - ◆ Create admin account - note the password.
 - ◆ Special:User Rights
 - ◆ Check Administrator, Interface Administrator, Bureaucrat and Suppressor
 - ◆ Save user groups

29.11 Extracting Hacks

- Extract from MTS Assist
- Special Pages
- Export Pages
- Add the pages specifically below

```
MediaWiki:Common.js
MediaWiki:Group-user.css
MediaWiki:Common.css
MediaWiki:Vector.css
MediaWiki:Timeless.css
```



```
MediaWiki:Gadget-veCenterLoader.js
MediaWiki:Gadget-autonum
MediaWiki:Gadget-autonum.js
MediaWiki:Gadget-autonum.css
MediaWiki:Gadget-veCenterLoader
MediaWiki:Gadget-veCenter.js
MediaWiki:Gadgets-definition
```

- Ensure the following are checked/unchecked:
 - ◆ Include only the current revision, not the full history - CHECKED
 - ◆ Include templates - UNCHECKED
 - ◆ Save as file - CHECKED
- Export to MW-hacks.xml

29.12 Extracting Templates

- Extract from MTS Assist
- Special Pages
- Export Pages
- Add the pages specifically below

```
Template:DocLink
Template:Doc_Title
Template:Comment
Template:Incomplete
Template:Note
Template:Hint
Template:Warning
Template:Xref
PageTemplate
DocTemplate
```

- Ensure the following are checked/unchecked:
 - ◆ Include only the current revision, not the full history - CHECKED
 - ◆ Include templates - UNCHECKED
 - ◆ Save as file - CHECKED
- Export to MW-Templates.xml

29.13 Extracting Common Additional Files

Take the following from an Assist implementation that has them:

```
Aptean_Logo.png
Attention_niels_epting.png
hint.png
Bulbgraph.png
```

- Special:All Pages
- Enter start of file name in "Display pages starting at:"
- Select File Namespace from drop-down list and then click Go.
- Click on the file until a full-screen version appears.
- Right-click, Save Image As
- Save to your chosen directory.

29.14 Extracting Namespace Files

- Extract from an existing Assist
- Special Pages
- Export Pages
- Add the pages specifically below, replacing the namespace with the namespace of the Assist system - in this case this is from CTMS Assist:



CTMS:Privacy_policy
 CTMS:General_disclaimer
 CTMS:Copyrights
 CTMS>About

- Ensure the following are checked/unchecked:
 - ◆ Include only the current revision, not the full history - CHECKED
 - ◆ Include templates - UNCHECKED
 - ◆ Save as file - CHECKED
- Export to MW-Namespace.xml

 **Note:** You will then need to amend the About page to change the product name and copyright dates.

29.15 Importing Additional Files, Templates and Hacks into a Wiki

- Ensure that all additional files from MW-add-files have been added.
- Upload additional files:
 - ◆ Special:Upload Multiple Files
 - ◆ Add a description if you want
 - ◆ Select the following files:

Aptean_Logo.png
 Attention_niels_epting.png
 hint.png
 Bulbgraph.png

- As soon as you select the files, the files will be uploaded. The page will indicate if there is any error uploading the files (for example if they already exist)
- Upload hacks and templates:
 - ◆ Special Pages
 - ◆ Import Pages
 - ◆ Browse for the file to import, one of (do both)
 - ◇ MW-hacks.xml
 - ◇ MW-Templates.xml
 - ◆ Set InterWiki prefix to the name of the Wiki e.g. MTS, Portal, CTLTMS, etc
 - ◆ Add a comment if you want.
 - ◆ Ensure option "Import to original namespace" is selected
 - ◆ Upload File.

29.16 Importing Namespace Files

- Special Pages
- Import Pages
- Browse for the file to import
 - ◆ MW-Namespace.xml
- Set InterWiki prefix to the name of the Wiki e.g. MTS, Portal, CTLTMS, etc
- Add a comment if you want.
- Ensure option "Import to a namespace" is selected
- Select the namespace from the drop-down list that matches the Assist being imported into, for example, MTS for CTMS, EPOD for C-ePOD, etc
- Upload File.

29.17 Additional Actions

The following are additional actions that are required on installing a new Assist, with some sample pages.

- MediaWiki:Pagetitle-view-mainpage - change this text to define the title of the wiki e.g. Assist - OBS Hub
- Update the main page - the MTS one is the one with all the best notes in.



- Update the Did You Know page with the common Assist-based help topics - there is an example in this Assist of a Did You Know page which can be copied or exported, imported and then edited.
- "Download as PDF" to "Print as PDF" - e.g. "Print as PDF tab in the tab bar, typically on the top of the screen".

You can use the files on this Assist as templates:

- [OBS:About](#)
- [OBS:General_disclaimer](#)
- [OBS:Privacy_policy](#)
- [OBS:Copyrights](#)

29.18 MediaWiki

You can find the MediaWiki license, contributors, FOSS attributions and components here:

- [Special:Version](#).

29.19 Common Maintenance Actions

29.19.1 Creating Users/Resetting User Passwords

It is ALWAYS better to create a new user on the Wiki from the Special page "Create Account". In here, you should create the user and enter the email. This will send an email to the user to reset their own password. Details:

- Go to [Special:CreateAccount](#).
- Enter the username
- Click the box to create a temporary password, or enter a password here.
- **Enter the email address.**
- Click **Create Account**.

However, in the event of correcting a problem, this can be done from the command line:

```
{InstallDrive}:\xampp\php\php.exe {InstallDrive}:\xampp\htdocs\calidus-assist\{wikiname}\maintenance\create
```

⚠ Warning: You must change to the root of the install drive or this will not work e.g. enter "{InstallDrive}:" at the command prompt BEFORE the previous command.

You can also add some parameters to promote the user with group rights, as follows:

```
--bureaucrat      Add the account to the bureaucrat group
--sysop           Add the account to the sysop group
--interface-admin Add the account to the interface-admin group
--custom-groups  Comma-separated list of groups to add the user to. This allows adding the user to any custom
Since MW 1.27, a user is only added to a custom group, if this group actually exists according to $wgGroupPermissions
--force          If account already exists, just grant it rights or change password. Do not create a new account in
```

In the event of needing to change a password, it is ALWAYS better to get the user to do it themselves - if the email has been set up, they can access the reset from there.

System admins can also force the sending of the reset password link from [Special:ResetPassword](#).

In the event that this is simply correcting a previously set password, you can use the command line:

```
{InstallDrive}:\xampp\php\php.exe {InstallDrive}:\xampp\htdocs\calidus-assist\{wikiname}\maintenance\change
```

⚠ Warning: You must change to the root of the install drive or this will not work e.g. enter "{InstallDrive}:" at the command prompt BEFORE the previous command.



29.19.2 Managing Revisions

Sometimes, you may want to roll-back edits, or delete or hide revisions to a page, perhaps to remove dangerous content.

This is controlled through user rights and groups - see below for more information on that.

Using the rollback feature (for administrators and users with the "rollback" right)

- Go to the page history, the user contributions page, or a diff page.
- Find the "rollback" link next to the consecutive edits you want to revert. It appears before the "undo" link.
- Click the "rollback" link. The page will automatically revert to the previous version by another user, and a pre-filled edit summary will appear.
- Save the edit. The change is marked as a "minor" edit in the history.
- Important: After using rollback, it's recommended to check the recent revisions to ensure all disruptive edits were reverted and no constructive edits were accidentally removed.

Using the undo feature (for any user)

- Navigate to the page history.
- Find the specific edit you want to undo in the list.
- Click the "undo" link at the end of that edit's line.
- An edit page will load with the changes from that edit removed. Later edits are retained by default.
- You can modify the default edit summary if needed.
- Click "Save page" to revert the single edit.

When to use which method

- Use rollback for reverting a large number of consecutive bad edits, such as vandalism, by the most recent user. It's a one-click process for authorized users.
- Use undo to revert a single edit or to manually edit the page to combine or resolve conflicts with later edits. The undo feature is available to all users.

You can permanently flatten all history in a page using the command line.

- For page histories: Run the script from your MediaWiki installation's directory. You can delete all old revisions by using the flag or by specifying the page ID.
- Example command (once in your wiki's maintenance directory):
 - ◆ `{InstallDrive}\xampp\php\php.exe deleteOldRevisions.php --delete 123`
- (Replace 123 with the page ID gathered from the page information).
- Note that running this script without `--delete` will just list the count of revisions that will be removed.

To delete a specific revision in MediaWiki, use the RevisionDelete feature, which administrators can enable to hide revisions from public view. This feature allows you to hide the content, username, or edit summary of one or more revisions without permanently removing them. First, enable the permission, then go to the page history, select the revisions using the checkboxes, and click "Change visibility of selected revisions" to hide them.

For administrators using RevisionDelete

1. Enable the permission: Ensure your user account has the permission. This may require editing LocalSettings.php.
2. Go to the page history: Navigate to the page and click the "View history" tab.
3. Select revisions: Check the boxes next to the revisions you want to hide.
4. Change visibility: Click the "Change visibility of selected revisions" button.
5. Choose what to hide: Select the options to hide the content, usernames, or summaries.
6. Apply changes: Add a log comment and click the "Apply to selected revisions" button.

29.19.3 Managing Interwikis

See here for an explanation of what we use this for: [Interwiki](#).

Each product wiki SHOULD be set up so that interwiki links are configured within the CALIDUS HUB only, and then disseminated to the individual Assists.

This is done in the following way:



in LocalSettingsAdditional.php:

```
$wgSharedDB = 'obs_assist'; # The $wgDBname for the wiki database holding the main interwiki table
$wgSharedPrefix = 'obs_'; # The $wgDBprefix for the database. Defaults to the prefix of the current wiki if
$wgSharedTables = ['interwiki'];
```


If they are not, fix the Assist file above.

Current interwikis:

- epod
- cmcs
- ctms
- obs
- cportal
- cvision
- cwcs
- cwms

To add a new/edit an existing interwiki:

- *Wiki Tools/Special pages*
- *View and Edit InterWiki data*
- New
 - ◆ Click *Add an interwiki or language prefix*
 - ◆ Prefix: new unique prefix
 - ◆ Forward - ticked
 - ◆ Transclude - ticked
 - ◆ URL: the assist URL e.g.
https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/Index.php?title=\$1
 - ◆ API: the API URL e.g. https://calidusassist.adcservices.apteancloud.com/calidus-assist/MTS/api.php
 - ◆ Click **Add**. (You may have to enter a reason).
- Edit
 - ◆ Click the Edit link against the interwiki and make the changes you need, then click **Edit**. (You may have to enter a reason).

 **Note:** You need to be a sysop (a member of the Administrators group) to edit interwiki links. Currently that is the Admin user. See following section.

29.19.4 Maintaining User Rights

You must be an Administrator to do this. Currently that is the Admin user.

Use the *Wiki Tools/Special pages* link.

- User group rights - the rights associated to each group - this is maintained in the LocalSettings*.php files and will likely not change. Check this for a list of the rights that you want to assign. For example, if
- User list - a list of the users
- User rights - allows you to change the groups associated to each user, and therefore the rights allowed.
 - ◆ Find the user ID and click **Load User Rights**
 - ◆ Tick the boxes that you want them to have the rights to under Groups you can change
 - ◇ autoconfirmed user - has confirmed login through email address.
 - ◇ bot - leave unchecked/unassigned - no bots in this system.
 - ◇ administrator - admin/sysop (superuser) rights, patrol other users' unpatrolled edits. Basically everything
 - ◇ interface administrator - amend site CSS and Javascript i.e. a system maintainer.
 - ◇ bureaucrat - auto-patrolled edits
 - ◇ suppressor - revision maintainer
 - ◆ You can also set the following against certain groups:
 - ◇ Expires - the expiration date - use below instead if required.
 - ◇ Does not expire - check this instead.



29.19.5 Blocking Users

When users leave the organisation, we should block their access for the Assist user. You use Special pages to do this:

- [Special:ListUsers](#) - a list of all users, where you can block a specific user using the link provided. You will be taken to the next page.
- [Special:Block](#) - the mechanism of blocking users. You can get to it from Special pages or from the users list above.

To block users, either:

- Select the Block option against the user in the users list, or go to the block special page directly and enter their username.
- From here, block sitewide, and in block details check all boxes. Then change the expiry to Infinite, and click the button to block the user.

29.19.6 Patrolling Edits

Please see separate guide [Assist - Patrolling edits](#) for more details on this.

29.20 Support Issues

29.20.1 Seeing a Cat in the Background

There is a cat.svg linked from Timeless skin. (/calidus-assist/OBS/skins/Timeless/resources/images/cat.svg). This is the default.

This is configurable in skin.json in the Timeless directory for your Wiki. i.e.
D:\xampp\htdocs\calidus-assist\OBS\skins\Timeless\skin.json

Solution: Set this to user-grey.svg instead.

```
"config": {
  "TimelessBackdropImage": {
    "value": "user-grey.svg",
    "description": "Set it as you would $wgLogo to an appropriate background image. Rec"
  },
}
```

With multiple wiki installs, this is onerous. To facilitate changing multiple wiki installs, there is a directory in D:\Assist Install Files\MW-add-files called skins.

To apply:

- Copy the directory skins.
- Navigate to your Assist main folder e.g. D:\xampp\htdocs\calidus-assist\WMS
- Paste - this will overwrite the config file with the corrected one.

Warning: This file is delivered with MediaWiki. A new install will overwrite this file. If you have updated MediaWiki or installed a new version of the Timeless skin, then compare the saved skin.json file with the new one and update with any new/changed attributes.

29.20.2 Zero Bytes PDF

Problems typically display as the PDF being downloaded is zero bytes or cannot be opened.

The most common issues are with single page PDFs. The normal solutions are:

- For full documents, ensure that there is a heading 1 element in the file being downloaded.
- If you are transcluding pages into a document, there is typically a limit of around 15 transcluded pages before the document will not produce. Instead, consider grouping the pages into a category and extracting that instead of creating a single document.

Some documents will include a <div class="noprnt"> after the title page and a closing div at the end. This used to be require din older versions of the code, but now causes issues. To fix, remove the div and closing div tags (not the top ones around the vardefines, just the ones after that and at the very end).



29.20.3 '?' characters

Occasionally, PDFs will be produced with '?' characters in unusual places. This represents an unprintable character in the PDF. Typically, this is because of smart quotes or hyphen characters, usually because text has been pasted in from a Word document that has "helpfully" automatically changes all hyphens, quotes and single quotes into extended characters. The PDF conversion routine does not support these characters at this time. To solve this, edit the page in question and replace the quotes and hyphens with plain equivalents.

29.20.4 Unexpected Pages in PDF Books

When PDF books are created from Categories, sometimes there are pages included that are not expected.

Most of the time this is caused by inheritance of categories. If a page has a category and this is transcluded into another page, the default is that the page transcluding will inherit the categories listed in the transcluded page.

Check the category list of pages in Assist - usually you will see the offending page, and then the categories can be amended to resolve the issue.

Either remove the categories of the page if it is in the wrong category, or ensure that the categories are surrounded by NOINCLUDE tags. You should use the source editor to do this, as the Visual Editor does not handle this kind of meta data very well.



30 Appendix A: Document History

A.1 References

Ref No	Document Title & ID	Version	Date
1			
2			
3			

A.2 Document History

Version	Date	Status	Reason	By
0.1	25/02/2020	Issue	Initial Version	ANW
1.0	13/03/2020	Issue	Issue	ANW
1.01	20/02/2026	Issue	Re-issue with updated support guide	ANW

A.3 Authorised By

Matt Tipping Aptean Manager _____

Tony Walker Aptean Principal Consultant _____



31 Help:UpgradeWiki

Warning: This page has been superseded by [Assist Upgrade Actions](#). See there for more information. However, this old version might contain some useful information, so is preserved.

Note: The latest validated version of MediaWiki that works with Assist is 1.16.5.

Note: Although later versions may work, it is expected that the PDF export (required for most of the Assist pages) will eventually break, due to CSS being introduced in more modern versions.

31.1 Software Required

- MySQL Administrator (root access)
- php (part of MediaWiki)
- The full MediaWiki archive file, from here:
 - ◆ Current versions: <https://www.mediawiki.org/wiki/Download>
 - ◆ Old versions: <https://releases.wikimedia.org/mediawiki/>

31.2 Prior to Upgrade

- Back up the database schema being affected.
- Back up the installation for the wiki being upgraded.

31.3 Upgrade

Full upgrade instructions related to your version of MediaWiki are in the folder as a file called UPGRADE. Follow these instructions

Essentially it involves running

- php /maintenance/upgrade.php

Note: php is part of MediaWiki. you may need to directly point to the php exe in the main MediaWiki folder.

Note: Ensure that the <wiki>_owner account has full access to create and alter schema properties, or updates will fail.

