AlphaNodes GmbH ⚛

Checklist: Onboarding WikiGuide Plugin

This checklist helps you successfully implement and use the Redmine WikiGuide Plugin. It is divided into the different phases.

Phase 1: Installation & Configuration

☐ **Check Redmine Version:** Ensure your Redmine installation supports the minimum version required by the plugin. (Check the plugin documentation).

☐ **Download Plugin:** Download the latest version of the Redmine WikiGuide Plugin and depend plugins from the official source.

☐ **Install Plugin:** Install the plugin according to the official installation instructions. Pay attention to all dependencies.

☐ **First configuration:** Navigate to the Wiki Guide plugin configuration in the Redmine administration and configure the basic settings.

☐ **Activate Wiki TAGs:** Navigate to the TAGs plugin configuration in the Redmine administration and enable TAGs for Wiki to use them.

☐ **Check roles and permissions:** Make sure that users have the necessary permissions in the "Wiki" and "Wiki Workflow" section to use the plugin functions.

Phase 2: Project Configuration

☐ **Project configuration:** Go to the project configuration and activate the necessary modules (Wiki, Wiki Workflow) and configure the project-related settings for the activated modules.

☐ **Check project member role assignment:** Ensure that the required minimum number of project members exists for the selected wiki workflow. Check their role assignment according to the workflow used.

Phase 3: WikiGuide Functionality

☐ **Test LiveSearch:** Test the LiveSearch function and understand how it works.

☐ **Test read confirmation:** Understand how the read confirmation function works and where the captured data can be accessed by authorized users.

☐ **Test approval workflow:** Test the entire approval workflow from creation to resolution. Test this with different users. Document the planned procedure for your users.

☐ **Test the wiki list:** Test the wiki list and understand how the filter options work. Prepare custom queries for your users for the individual steps in the approval workflow. Ensure that these deliver the desired results and are available to users responsible.

Final Steps

☐ **Create/Review Documentation:** Create or review the documentation for your users.

☐ **User Training:** Train users on how to use the plugin, especially the workflows.

☐ **Build a knowledge base:** Create an internal knowledge base or FAQ to answer questions. Use TAGs for categorization. Store these TAGs as "Wiki Guide Buttons" in the plugin configuration.

Additional Notes:

• Create backups of your Redmine database before installing and configuring the plugin.

• Carefully read the plugin documentation.

• Utilize available resources, such as documentation, blog posts, or support, to clarify questions.

This checklist provides a comprehensive overview. The specific steps may vary depending on your activated functionality.

https://alphanodes.com/redmine-wiki-guide