

Wikipublisher

Wikipublisher: User Guide

23 September 2005, at 04:56 PM

From the PmWiki+WikiPublisher



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USER GUIDE

The following pages describe various aspects of using, administering and troubleshooting a Wikipublisher^w installation.

- Basic Features (p 1): The Wikipublisher^w system composes print pages by re-interpreting wiki markup^w for print in place of the web. . .
- Composition options (p 3)
 - Publish a Trail (p 3)
 - Publish a Search (p 4)
 - Publish Linked Pages (p 5)
 - Publish a Form List (p 6)
 - Structure and Style (p 7)
- Administration options (p 9)
 - Install (p 9) the script library
 - Register (p 9) with the pdfserver
 - Configure (p 10) the templates
 - Customise (p 10) markups
 - Recipes (p 11) included
- Troubleshooting (p 15)
 - Skins (p 15)
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Wikipublisher^w is an extension to PmWiki^w that supports the collaborative creation of print documents which draw their content from wiki web pages.

PmWiki sites with wikipublisher installed look and act like normal wiki sites, except that they have a pdf icon on every page. Some pages, such as those listing trails^w and categories^w, may include a **Typeset** button; pressing this button composes the listed pages into a single rich pdf document.

Wikipublisher is distributed under the *General Public Licence*¹. It is distributed in 2 parts:

- a script library which makes PmWiki generate output to the Wikibook DTD[?], instead of XHTML
- a pdfserver application which, when given wikibook XML content, composes this into pdf

This page introduces the wikipublisher USER GUIDE. The site is running pmwiki-2.0.5 and wikipublisher-2.0.beta3 (candidate).

¹ www.gnu.org/licenses/gpl.html

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1 Basic Features^w

THE WIKIPUBLISHER^w SYSTEM COMPOSES PRINT PAGES by re-interpreting wiki markup^w for print in place of the web. Just as PmWiki^w applies the selected web template (skin and accompanying style sheet) to compose a web page, so wikipublisher applies a suitable print template to compose a print document. Basic typesetting features include:

- generate a cover page, summary page (optional), table of contents page, list of tables (optional), and list of figures (optional)
- turn intra-document page links into page number references
- autonumber page headings based on trail page hierarchy depth (optional)
- table column width and cell text wrapping and alignment handled automatically
- substitute high resolution print images for low resolution web images, if available
- show links to external sites, such as *PmWiki.org*², as page footnotes
- reformat tool tips, such as TINFL (there is no free lunch), as parenthesised text
- hide or omit web-oriented constructs, such as revision marks or a page table of contents, in the print version
- pages laid out for duplex printing — mirrored odd and even page headers and footers (optional)
- sticky notes become marginal notes
- widow³ and orphan⁴ control and headings always kept with their following paragraphs
- one-click reader control over various composition options, such as font style, watermark, and when to start a new page, with an options^w form

*Form follows
function*

While document composition is automatic and the markup translation guarantees consistent output, authors still need to proofread the printed results to check that the output is suitable and correct.

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² www.pmwiki.org/wiki

³ a *widow* is when the last line of a paragraph falls at the top of a page or the last word of a paragraph falls on a line by itself

⁴ an *orphan* is when the first line of a paragraph falls at the bottom of a page

2 Composition options

2.1 Publish a Trail^W

The following options are available for typesetting the pages on a trail.

The “typeset” directive

An author can turn any wiki trail^W page into the table of contents for a page collection by adding a *typeset* directive to the trail page:

This adds a **Typeset** button to the trail page which, when pressed, assembles the pages on the trail into a single document, typeset for printing. The *options* let the author over-ride the default document composition settings, using *keyword=value* pairs. The following table lists available options.

Available typesetting options

Keyword	Values	Comment
surtitle	text	appears on cover
title	text	appears on cover and in header
subtitle	text	appears on cover and in footer
cover	left center right	alignment of cover text
coverstyle	sans serif	font style for cover headings
watermark	text	appears on every page
duplex	on off	format pages to print 2 sided
justification	on off	text justified or ragged
sectionnewpage	on off	major section starts a new page
autonumber	0 1 2 3	depth of numbered page headings
headingstyle	sans serif	font style for heading text
bodystyle	sans serif	font style for body text
tablelist	on off	generate a list of tables
figurelist	on off	generate a list of figures
pagesize	A4 US	determine the output page size
cache	on off	cache a copy of the generated pdf (future)
draft	on	watermark=draft cache=off subtitle=jdraft version'

A reader can over-ride any author-defined settings by pressing the **PDF options** button.

The “pubtrail” action

An author can let readers choose which of the trail pages to include in the typeset document by using the *pubtrail* page action:

```
[[UserGuide?action=pubtrail]]
```

```
.....  
UserGuide?action=pubtrailw
```

This turns the trail into a form, with a check box against each page on the trail. A reader checks pages of interest, then presses the *Typeset* button.

The “traillinks” directive

An author can also create a formatted list of the stops on a trail by using the *traillinks* directive, such as for display in a sidebar page. This directive omits the publishing features:

```
(:traillinks UserGuide:)
```

```
.....  
• Basic Features (p 1)  
• Composition options  
  – PUBLISH A TRAIL  
  – Publish a Search (p 4)  
  – Publish Linked Pages (p 5)  
  – Publish a Form List (p 6)  
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  – Skins (p 15)  
  – Markups (p 15)  
  – PDF Errors (p 15)  
  – Wikibook DTD (p 15)  
• Reference  
  – FAQ (p 17)  
  – Markup Extensions (p 18)
```

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2.2 Publish a Search^w

All the search features are optional; some may not be available on a given wiki. If in doubt, consult your wiki administrator. On screen, the lists of links on this page are each presented as a “select and typeset” form; in print, they are presented as lists of links.

The “search” action

After entering a request in the search box and pressing *Go*, the information-seeker sees a list of qualified pages, with a checkbox against each pagename and a *Typeset* button at the bottom. Check

the box against each page of interest and press the button. Wikipublisher^w composes the chosen pages into a PDF. For example, searching for “trail”:

```
(:pagelist group=Wikipublisher 'trail' fmt=custom list=normal:)
.....

Wikipublisher Basic Featuresw
  FAQw
  Home Pagew
  Installw
  Publish a Searchw
  Publish a Trailw
  Recipesw
  User Guidew
```

Search for category pages

For sites whose pages are tagged with categories^w, the category search results can be displayed with checkboxes and a *Typeset* button by adding *fmt=custom* to the *pagelist* directive. For example:

```
(:pagelist link=Category.Requirements fmt=custom list=normal:)
.....
No matches.
```

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2.3 Publish Linked Pages^w

The links-related actions are optional capabilities.

The “backlinks” action

Clicking on the pagename at the top of the page will cause PmWiki^w to run a search for all the pages that link to the current page. It displays these in alphabetical order as a standard search results page, with check-boxes and a *Typeset* button. An author may also add this to a particular page. Like this:

```
[ [ { $FullName } ?action=backlinks ] ]
.....
Wikipublisher.PublishLinkedPages?action=backlinksw
```

To see the form, click the link.

The “links” action

This is a complement to the *backlinks* action — it shows all the pages that the current page links to, in alphabetical order. This may be part of the site’s template or used in a specific page. Like this:

```
[[ { $FullName } ?action=links ]]
```

```
.....  
Wikipublisher.PublishLinkedPages?action=linksw
```

To see the form, click the link.

The “linklist” directive

A variant of the links action can be used as a directive to list all the links on a particular page, in alphabetical order, for example in a Sidebar. This variant omits the typeset capability.

```
(:linklist UserGuide:)
```

```
.....
```

Wikipublisher Basic Features^w

```
  Configurew  
  Customisew  
  FAQw  
  Home Pagew  
  Installw  
  Markup Extensionsw  
  Markups?  
  PDF Errors?  
  Publish a Form Listw  
  Publish a Searchw  
  Publish a Trailw  
  Publish Linked Pagesw  
  Recipesw  
  Registerw  
  Skins?  
  Structure and Stylew  
  Wikibook DTD?
```

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2.4 Publish a Form List^w

The wikiforms recipe included with the Wikipublisher^w library adds (:wikiform:) and (:wikilist:) markup directives. The wikiform directive builds a page creation form using a FormTemplate; the wikilist directive generates a list of pages meeting the *fieldname=fieldvalue* selection criterion set out in the directive, such as a list of active issues^w. An information seeker can compose a typeset version of the pages listed.

To sort the list, click on one of the columns (by default, the list is sorted by page name — a 5 digit number). Clicking the column again reverses the sort order. Once the list is in the desired order, press **Typeset**. To customise the report layout, press the **PDF options** button.

Wikipublisher can typeset any page collection. The library also includes the wiki calendar recipe, enabling an information seeker to compose a typeset version of the calendar entries on display. Again, this includes a **PDF options** button.

2.5 Structure and Style^w

The typesetting engine, L^AT_EX, is *structure-oriented* — that is, an author focuses on content and meaning, not presentation. When composing print output, the engine applies presentation rules derived from the document's structure. This separation of content from presentation means printed pages are set out in a consistent manner, no matter how many different authors are involved.

It is this separation which enables us to generate web and print output from the same source. However, PmWiki^w also provides Wiki Styles^w, enabling authors to control the presentation of individual content elements, supplementing or over-riding any rules which a site administrator may have specified in the site's web style sheet. There are 3 kinds of styling:

- inline styles apply to parts of a block
- block styles apply to the current block element
- division styles apply to multiple block elements

While wiki markup elements are *media-neutral* and can be readily transformed to web or print, styles are *web-oriented* and hence can present a problem for the print channel. Specifically, we have to transform css-based web page styles into structure-based print page elements. Most of the time, authors don't need to worry about this — Wikipublisher^w takes care of it.

To do this, it makes “reasonable assumptions”:

- inline styles are mostly honoured
authors need to use inline styles with some caution — what looks good on the web may not look good in print, and *vice versa*
- block styles are usually honoured, but may be ignored
in general, it honours structural instructions (float this image right) but ignores formatting instructions (centre this heading)
- division styles are treated case-by-case
these are usually interpreted as print side-bars and float to the top or bottom of the page; this is a problem if the division is bigger than a page

This area will continue to evolve and improve. At the moment, it's fair to say that the more authors use markup, the less they have to worry about what the print output looks like. The more they use styles, the more they have to check that the print effect is suitable.

Tip Authors may find it useful to think of wiki styles as *wiki tags* — ways to define the meaning of content elements beyond those which the standard wiki markups offer. It then becomes easier to associate suitable web and print presentation rules with those wiki tags.

To be continued...

3 Administration options

3.1 Install^w

These instructions apply to a clean PmWiki^w install.

1. Download the library from Cookbook:PublishPDF
2. Move cookbook/wikipublisher into cookbook/
3. Move the skin directories in pub/skins/ into pub/skins/
4. Move the image files in pub/images/ into pub/images/
5. Move the css files in pub/css/ into pub/css/
6. Add the following line at the *start* of local/config.php
include_once("\$FarmD/cookbook/wikipublisher/extensions.php");
7. Modify your skin to use the required format for search boxes
Or, use the latexpmwiki skin provided
8. Register your site at <http://www.wikipublisher.org/wiki>
9. Read the enclosed User Guide^w (pdf)
10. Test that everything is working:
 - typeset a single page
 - add to a wiki trail page
 - do a search and publish
 - do a backlinks search
 - do a categories search

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3.2 Register^w

The Wikipublisher^w pdf2you server, which composes xml output into pdf, only accepts composition requests from registered sites. This works the same way as PmWiki.Url Approvals^w: if the requesting site is on the list of registered addresses, its requests get processed. To register a new wikipublisher user site:

1. edit the Wikipublisher:AccessControl.ApprovedWikiUrls page
2. add the address of your site to the list
3. press **Save**
4. click on your address to return to your site
5. click the pdf icon to generate a pdf of your site's home page

And that's it! There is also a link to the *access control* page on www.wikipublisher.org

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3.3 Configure^w

Wikipublisher^w includes a wikilib.d/ directory containing Site templates for all the forms used to control the way pages are composed for print. These are installed automatically and do not affect either the wiki.d/ or PmWiki^w wikilib.d/ directories. The form templates define layout metadata used by the typesetting engine. They are used to:

- determine the default values for layout of typeset pages
- generate the forms seen when a reader selects PDF options

There are 5 templates:

1. Site.Print Template^w defines options for typesetting a single wiki page
2. Site.Publish Template^w defines options for the (:typeset:) directive
3. Site.Search Template^w defines options for typesetting search results
4. Site.Calendar Template^w defines options for typesetting (:wikilog:) entries
5. Site.Wikipublisher^w defines the page through which a reader confirms all typesetting requests

An administrator may set up group print, publish, search or calendar templates. The settings in a group template over-ride those in the Site template. An administrator may also edit the site templates, for example to translate the field prompts and setting options into a language other than English.

The template syntax for a form element uses an extension of the definition list markup:

Prompt text variable tool tip text (settings) [\pm]

*Do not change the **variable** name! Do not change the + or - at the end of the line!*

When changing the language of radio button settings, the administrator *must* preserve the metadata value passed to the typesetting engine. For example, (left,centre,*right) becomes (left|gauche;centre;*right|droit). The order variable on the Calendar Template^w illustrates this capability.

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3.4 Customise^w

The Wikipublisher^w library supports all standard PmWiki^w markup, plus a number of markup extensions. Many site administrators will have taken advantage of the flexibility PmWiki offers and created local extensions to the standard markup. In most cases, such extensions will be ignored when typesetting a page, *unless the extension author provides a wikibook-compliant alternate markup rule*.

The library also provides alternate link and page list formats that are compatible with the Wikibook DTD (p 15) and appropriate for print. Again, the administrator must make sure that local customisations do not over-write these with formats appropriate for XHTML.

For example, suppose an administrator has created markup for the and <i> xhtml tags, using

```
Markup(" j *" , j inline' , " /\ \*(.*)\*' /\ " , j <b>$1</b>' );
Markup(" j ~" , j inline' , " /\ ~(.*)~' /\ " , j <i>$1</i>' );
```


To make marked-up text appear correctly in a pdf, the administrator writes the following rules *after* loading the wikipublisher library (which sets \$format) and *before* setting the html rules (so the pdf rules take priority):

```
if ($format==j pdf' ) {
    Markup(" j *" , j inline' , " /' \*(.??)\*' /" ,
        j <tbook:visual markup=" bf" >$1</tbook:visual>' );
    Markup(" j ~" , j inline' , " /' ~(.??)~' /" ,
        j <tbook:visual markup=" it" >$1</tbook:visual>' );
}
```

The scripts stdmarkup.php and altmarkup.php in the cookbook/wikipublisher/latex/ directory contain lots of examples. Together, they provide print support for all the standard markups defined in PmWiki plus the Cookbook:MarkupExtensions.

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3.5 Recipes^w

The Wikipublisher^w script library embodies a number of related recipes from the PmWiki Cookbook, plus various PmWiki.Skins^w. Taken together, they turn a PmWiki^w site into a rich publishing environment. This page describes what they do and which ones can be turned off.

Recipes

latex Translates wiki markup into wikibook xml. This completely replaces stdmarkup.php and wikistyles.php. It also provides wikibook equivalents for the markup extensions described below.

Required.

markup Extends standard PmWiki markup to encompass a variety of additional structures, such as smart quotes, footnotes, and drop capitals. Each markup extension (p 18) can be individually turned on or off.

Required.

pagetoc Automatically generates a table of contents for a wiki page. This is a web navigation aid, omitted in print. The pages in the User Guide^w make extensive use of toc directives.

Optional; to disable, set \$MarkupEnabled[jpagetoc'] = 0;

pdf2you Handles the interface between the wiki and the pdf2you typesetting server. Puts the pdf icon on every page.

Required.

rename Adds action=rename to rename any wiki page. To handle rename across groups, it generates a list of all the links on a page. As a by-product, it allows us to typeset a page and all (or a selection of) the pages it links to.

Optional; to disable, set \$MarkupEnabled[jrename'] = 0;

search Adds support for typesetting selected pages found by searching the wiki. This includes category pages. It also preserves location — all search actions occur within the current page.

Optional; to disable, set `$MarkupEnabled[jsearch'] = 0;`

titledictindex Adds support for publishing selected pages from a dictionary-style index page. This variant uses the markup extension to show a teaser paragraph for each page.

Optional; to disable, set `$MarkupEnabled[jtitledictindex'] = 0;`

wikiform Handles the forms interface for specifying pdf layout metadata, using the Site Template pages. Used to track issues^w, including typesetting of issue lists.

Required.

wikilog Provides a simple wiki calendar, with the ability to typeset the currently-displayed set of calendar entries. Also allows wiki forms to turn date fields of the form yyyy-mm-dd into a date, eg Tuesday, 13 September 2005.

Optional; to disable, set `$MarkupEnabled[jwikilog'] = 0;`

wikipublisher The engine that typesets individual pages, trail pages and search result collections. It creates output in either xhtml or wikibook xml. It also sets print-oriented versions of PmWiki format variables such as `$LinkPageExistsFmt`.

Required.

wpversion Tells us which version of the wikipublisher library the site is running (wikipublisher-2.0.beta3 (candidate)).

Required.

Skins

The wikipublisher skins are all required.

latexpmwiki This is based on the standard pmwiki skin, modified to support wikipublisher. It adds a backlinks action to the page name, adds a links on this page option, and ties the search box to a search action. Use this as the starting point for a wikipublisher-aware custom skin.

latexprint This is the skin that produces wikibook xml for a single wiki page.

latexpublish This is the skin that produces wikibook xml for a wiki page collection.

publish This is the skin used to produce xhtml from the print view of a single page or page collections (pdf option is unchecked). It replaces the standard pmwiki print skin.

Dependencies

Wikipublisher includes a selection of pdf icons and expects to find these in pub/images.

The markup extension requires the markup.css file and expects to find this in pub/css.

The wikilog extension requires the wikilog.css file and also expects to find this in pub/css.

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4 Troubleshooting

4.1 Skins?

Page *Skins*? does not exist.

4.2 Markups?

Page *Markups*? does not exist.

4.3 PDF Errors?

Page *PDF Errors*? does not exist.

4.4 Wikibook DTD?

Page *Wikibook DTD*? does not exist.

5 Reference

5.1 FAQ^w

Wikipublisher^w offers authors and administrators a range of features for controlling content and appearance of printed output.

Techniques for authors

How do I enter text that appears on screen but is hidden in print?

There are 2 markup extensions to support this

```
Normal text is printed

=>Right-aligned and hidden for printing

=<Left-aligned and hidden for printing
.....
Normal text is printed
```

How do I insert a page break into printed output?

Page breaks are based on structure. For composing a single wiki page, the reader has the option of specifying that headings of a particular level always start on a new page. By default, single pages are typeset with no breaks. For composing page collections, the reader has the option of specifying that each wiki page starts a new page. By default, search and calendar page collections are typeset with no breaks. Trail pages are typeset with each major section (first level list items) starting a new page.

How can I omit one or more trail list items from the typeset output?

The composer takes advantage of the “invisible stop” markup extension (backtick-fullstop). In normal page display, this is simply removed. However, a number of services, including typeset and page table of contents, ignore any text after an invisible stop. If an author starts a list item with an invisible stop, the composer ignores it. As far as PmWiki^w is concerned, such items are not on the trail. For example:

```
`.* a list item with an invisible stop at the beginning
.....
    • a list item with an invisible stop at the beginning
```

Why are there a lot of blank pages in the output and how do I prevent these?

The composer is configured to typeset page collections for double-sided printing. This means major headings start on odd numbered (right-hand) pages. If the previous content page is also an odd numbered page, the typesetting engine inserts a blank page automatically. A reader can over-ride this by selecting duplex *off* on the options form. A writer can put (:typeset duplex=off:) on a trail (p 3) page. An administrator can configure (p 10) the Site Templates. The ideal solution is to use a printer that supports duplex printing.

Techniques for administrators

Will I be able to install the wikipublisher server locally?

The server-side composition software has a number of external dependencies: $L^A T_E X$, *ImageMagick*⁵, and an xslt processor. Installing (p 9) the Wikipublisher PmWiki script library is simple; installing the server-side software is less so. Once the beta version is more stable, it can be made available to interested parties, under an open source licence.

I press Typeset and a pdf comes back. How is that done?

The PmWiki engine takes wiki markup and normally produces xhtml output, suitable for viewing through a web browser. The Wikipublisher library gives PmWiki an alternate set of markup translation rules, which cause it to produce output to the print-oriented Wikibook DTD (p 15). The xml is then passed through an xslt processor to transform it into $L^A T_E X$ ⁶ markup. Pdflatex composes this into a pdf file.

To be continued...

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5.2 Markup Extensions^w

An administrator can turn extensions on and off

Wikipublisher^w works best when all MARKUP EXTENSIONS are turned on. This is the installation (p 9) default. However, all extensions are optional, controlled through the \$MarkupExtensionsFmt array. This is set to:

```
SDV($MarkupExtensionsFmt,
    array("inote abbr 'A ' . ' - ' s ' : ' f -d ... aquo mac ' / ' @ ' ; [ ^ ",
    "q&a A; { | } = | { = revisions ^ !! fig :: para lazyweb spaced squo links"));
```

To enable a selected subset of these markups, copy the above 3 lines into local/config.php *before* including the Wikipublisher^w library and remove the markups you don't want.

To disable just a few markups, add one or more lines like the following *before* including the library:

```
$MarkupExtensions['extension'] = false;
```

For example, \$MarkupExtensions[jq&a'] = false; will disable the variant of Q: and A: markup, restoring PmWiki^w's default behaviour.

Available extensions

All extensions "do the right thing" when a page is composed for printing; most of them significantly improve the quality of printed pages.

⁵ www.imagemagick.org

⁶ www.tug.org

Character markups

These extensions provide additional special characters.

List of character extensions

Extension	Markup	Function
'.	`.	invisible stop; removed on output, tells markups such as para to “stop”
'-	`-`	backtick-hyphen makes an en dash – (meaning “to” as in A–B)
's	` `	backtick-space makes a non-breaking space
':	`:`	backtick-colon makes a mid-dot ·
'f	`1/4` `1/2` `3/4`	makes a fraction ¼ ½ ¾
-d	-- d-d +- -d	make em dash —, digit en dash digit, plus or minus ±, and minus digit
...	...	ellipsis ...
aquo	<- -> <<...>> <... ...>	left and right arrows ← → and angle quotes « ... » ‹ ... › and ... ›
mac	{vowel}	macronised vowels Ā, ā, Ē, ē, etc
copy	(tm) (r) (c)	® © symbols
squo	n/a	automatic smart quotes — highly recommended for pdf

Inline markups

These extensions provide additional text markups.

List of inline extensions

Extension	Markup	Function
j/	' /text/ '	<cite>text</cite> (often rendered in italics)
j@	' @text@ '	<kbd>text</kbd> (often rendered in monospace)
j;	' ;text; '	small caps text (if the browser supports this font variant)
[^	[^footnote text^] and [^#^]	swallow footnote text and list the footnotes, with links both ways
{ }	{abbr abbreviation} and {:term:definition}	<abbr title=j... '> and <dfn title=j... '> tags (with print equivalents)
{=	{=sticky note colour=}	a sticky note, colour (optional) is yellow, green, blue, purple, pink, grey
revisions	(:revisions:)	toggle between show and hide revision markups insert and

Block markups

These extensions provide additional paragraph markups.

List of paragraph extensions

Ex- ten- sion	Markup	Function
q&a	Q: and A:	render Q: and A: markups with drop-caps
A;	D;rop caps; markup	Drop cap followed by small caps (looks stunning in pdf)
=	=<text, = text and =>text	left, centred and right aligned text (left and right aligned omitted in print)
^!!	!run-in head!text	run-in headings (if the browser supports this — looks stunning in pdf)
fig	=figure image caption	display an image and its caption (superseded by image caption)
::	:term:definition::more definition	multiple <dd> tags per <dt> tag (also tidy :: used for indenting) and * item::more text for paragraphs in lists

Link markups

These extensions provide additional link markups.

List of link extensions

Ex- ten- sion	Markup	Function
inote	(:inote PageName:)	inserts the contents of PageName formatted as a sticky note
abbr	n/a	prevents wikiwords with only one lower case letter, like PhD or CIOs
'A	Wiki `Word	another way to prevent wikiwords, like PhD
para	T[*#:] Name#id and (:para Name#id action:)	teaser markup and paragraph include markup (action = more, edit)
lazy- web	www.affinity.co.nz	lazy web links — omit the http://
spaced	n/a	tidy wikiword spacing and display wikiwords like TheReturnOfTheKing as The Return of the King
links	n/a	automatic tool tips on wiki links, if the page starts with a heading or definition; also disables links to the page you're on, and highlights them

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Page collection published on 23 September 2005, at 04:56 PM

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