7.4 Review workflow

If you have a page that has to be reviewed by others before it should be published, you can use the review workflow of the page. The review can be started for pages with or without the revisions feature. If the revisions feature is turned on for the namespace in which the page is located, the page will be in draft mode and locked for editing until the review end date has been reached.

During the review phase, assigned reviewers will "vote" on the page and either accept or reject the page. If the extension BlueSpiceReviewExtended is installed, the workflow can run sequentially or parallel for the reviewers and the reviewers can be allowed to edit the page. A reviewer also has the option to delegate a review task to a different user.

Use case: A basic review workflow

Anna and Phil are responsible for all content of the IT department of their company. They have many responsibilities and are not always able to create their IT wiki pages. They task Laila, the company’s intern, to write the draft for the new holiday policy. They tell Laila that she can include images on the page to make the page more eye-catching. Laila is happy about this task and gets to work right away. Anna reminds Laila to keep Phil in the loop and to have any images on the page reviewed by someone in marketing.
The review workflow consists of the following steps:

1. **Laila (author):** After finishing the changes to a page, Laila starts the review cycle for that page. Laila decides that Phil needs to proofread the page first, then Malik in Marketing will approve the images. Finally, Anna gives the okay to publish the page. Since Anna is very busy, Laila has set the workflow to run for 14 days. She sets the workflow so that all reviewers have to review the page in sequential order.

2. **Phil (first reviewer):** Phil proofreads the page and adds the correct categories to the page (IT, Policy). He then closes his review task by accepting the page.

3. **Malik (second reviewer):** Malik adds some professional graphics to the page and accepts the page.

4. **Anna (third reviewer):** Anna doesn’t have time to review the document, since it is not one of her priorities. She delegates the final vote to Phil.

During the review period, the page has the following characteristics:

- It is **locked for editing** for the entire duration of the review period. Exception: The extension `BlueSpiceReviewExtended` allows the option to have the reviewers edit the page during the review period. In our example, the reviewers can make changes.
- It displays an alert message: "Page is currently being reviewed."
- The Review menu item in the QM tools shows "Review in progress".
- When a reviewer opens the QM tools, he is alerted by a "Vote!" notice on the Review menu item.
- For each reviewer who has completed their review, their action is shown under "recent workflow steps" on the review page.
- It is listed on the special page `Special:Review`.  

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The image depicts the review workflow with the following steps:

- **Create draft**
- **Add categories, proofread content**
- **Optimize images**
- **Finish workflow**
Technical requirements

The following extensions and configurations are part of the review functionality:

- **Extension**: BlueSpiceReview
- **Extension**: BlueSpiceReviewExtended
- **Config manager > Extension > BlueSpiceReview / BlueSpiceReviewExtended**

Create a review

**BlueSpiceReview** is a workflow tool for MediaWiki. It allows assigning users to a page who then should complete their review within a certain timeframe.

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The review page

All relevant info can be accessed from the **Review** flyout in the **Quality management** tools. This screen shows the review settings. If a review is running, users see a form to cast their votes. They can also expand the collapsed workflow settings to see the details for this review.
Starting a review

All users with sufficient permissions can start (or edit) a review on a page.

Possible settings:

- Start date of the review
- End date - date on which review expires and that page is considered reviewed even if no action from reviewers occurred. It has no effect on the review itself.
- Type - review type determines what will happen to the page once the review has been successfully completed. The default type is Approval so that it can be used in conjunction with the Approval feature if this feature is activated in a namespace. Currently, BlueSpice only ships with this one type out-of-box.
Review workflow

- Reviewers grid - a list of all reviewers assigned to review a particular page. Reviewers can be added by clicking on the "Plus" button above the grid and typing in the name of the user in the dialog that pops up. Existing reviewers can be removed by selecting a reviewer and clicking on the "x" button.

- Additional options - depending on the wiki configuration, additional options may appear. See BlueSpiceReviewExtended for more information.

A review can only be started if at least one review has been added. Once all settings are set, click save to start the review. At this point, all assigned reviewers receive a notification (depending on their notification settings) that there is a review pending, and that they need to review it. During the review process, editing of the page is disabled unless the setting to allow editing has been activated.

Casting votes

When assigned reviewers visit that page, they are prompted to cast their vote.

The voting form consists of:

- Comment box - here reviewers can explain the reason for their vote
- Agree button - by clicking this button, users cast a "yes" vote and agree to the proposed version of the page.
- Disagree button - by clicking this button, users cast a "no" vote and reject the proposed version.
- Delegate button - users can delegate their assignment to another user. This button opens a dialog for delegating the vote.

All votes along with comments are displayed under "Recent workflow steps" in the same flyout as the vote form and in the page history.
Review overview

The page Special:Review provides an overview of all ongoing reviews. It can be accessed from the main navigation under "Global actions", item "Review". Clicking on an individual review opens a list of all reviewers assigned to review this page along with their votes (indicated by the eye icon before the username). A grey eye icon means the reviewer has not yet reviewed the page, green means a "yes" vote, while red means a "no" vote.

Configuration

In the Config manager, you can change the following settings:

- **Only the owner of a review can change it**: If this is unchecked, any user with edit rights can update a workflow.

Related info

- Reference:BlueSpiceReview
BlueSpiceReviewExtended is an extension to BlueSpiceReview extension. It adds more features to its interface. To learn more about review process, read the page for BlueSpiceReview.

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Review options

All the options added by BlueSpiceReviewExtended are visible under the reviewer grid in Review settings.

There are three options that are available, when setting up the review process:

- Reviewer can edit the page - everybody that is assigned to the page as reviewers can edit the page while review is in progress.
Follow the reviewer order - reviewers will be able to cast their votes in order that they are listed in the grid of assigned reviewers. Only when one is finished casting a vote, next one can start. The order of the reviewers can be adjusted by clicking on up and down arrows that appear when hovering above the reviewer in the grid.

Restart review if review rejects it - if any of the reviewers votes "no" (disagrees), review is restarted and all of the reviewers must cast their votes again.

Templates

Review process for some pages and some organization is a lot of times very similar, with same options and same list of reviewers. In order to minimize the effort when starting a review, templates are introduced. Template controls are located at the bottom of review settings.

Saving a template

Once the list of reviewers is entered and other options set, enter the name for the template in the input field and click on the arrow in the "Load" button. Several options will be offered:

- Save for me - the template will be shown only to the user who saves it
- Save for everybody - the template will be shown to everybody

Pick the desired option and the template will be saved

Applying a template

Once there are templates saved, users can choose from the list of templates, and, after clicking "Load" button, all the options and the list of reviewers will be set as saved in the template.
Deleting a template

To delete a template, choose the desired template to delete, click on the arrow in the "Load" button and select "Delete".

Configuration

In the Config manager, you can change the following settings:

- **Workflow will be added to page history**: This enables that workflow votes are listed under the page history with the corresponding version.

Related info

- Reference: BlueSpiceReviewExtended

Config manager

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About Config manager

With the Config manager, a wiki user with sysop rights can manage all BlueSpice wiki-wide settings in one place. In the navigation, it is located under Global navigations > Management > Config manager. This link loads the page Special:ConfigManager.
Layout

Filter options

All settings can be accessed through the following filter options:

- **Feature**: group by type of functionality the setting belongs to (search, administration...)
- **Extension**: group by extension name
- **Package**: group by BlueSpice edition and services (BlueSpice free, BlueSpice pro, Matomo)

All settings are available in any type of grouping. Changing the grouping type does not add or remove setting options. It just groups them differently.

After settings are adjusted, they can be saved by clicking **Save**, or reset to the default settings by clicking **Reset**.
Searching for settings

A search bar is located above the list of settings. Type in a keyword such as "logo" to find the corresponding setting. The search returns settings regardless of the currently selected group.

**Note:** The search field has to be empty if you want to see the filter menu instead of the search.

![Config manager search box]

Settings by extension

BlueSpiceFoundation

- **Logo path:** The logo image should be stored in the /images folder of your installation. If you store it in the /skins folder of your BlueSpice installation, it could be overwritten with an upgrade.

To upload the logo directly in the wiki:

1. **Upload** the logo on the page *Extended file list (Special:ExtendedFilelist)*. This is a link under the *Global actions* navigation.
2. **Search** for the logo name in the extended file list.
3. **Click** on the thumbnail image of the logo. This opens the logo on a separate page.
4. **Copy** the relative logo path from the address bar. In a typical Wiki configuration, this path starts with `/w/....`

![Relative image path](https://nextminor.bluespice.test/hw.doc/zhinst_img_auth.php/6/68/LASERLINE_Logo_2016.png)

5. **Paste** the logo path into the text field for the logo.

![Logo path](https://nextminor.bluespice.test/hw.doc/zhinst_img_auth.php/6/68/LASERLINE_Logo_2016.png)

6. **Click** *Save*.

7. **Refresh** the page (Strg+F5).

- **Favicon path:** The favicon image should be stored in the `/images` folder of your installation. If you store it in the `/skins` folder of your BlueSpice installation, it could be overwritten with an upgrade. Favicon images have the file extension `.ico`.

- **Allowed file extensions:** For security reasons, the types of files that users can upload are restricted. Here, you can allow additional file formats. If a file format is blacklisted in the server configuration, adding this file extension here will not allow this file type to be uploaded. See mediawiki.org/wiki/Manual:Page_title for more info.

- **Allowed image extensions:** The standard web image types are listed here. In general, you want to restrict image uploads to web images. See developer.mozilla.org/en-US/docs/Web/Media/Formats/Image_types for more on browser-supported image types.

**BlueSpiceAbout**

- **Show link “About BlueSpice” in the main menu:** Shows or hides the link to the page AboutBlueSpice in the main navigation.
BlueSpiceArticleInfo

*BlueSpiceArticleInfo*, together with *BlueSpiceAuthors*, *BlueSpiceReaders*, and *BlueSpiceExtendedSearch* is part of the *Page information* in the quality management tools.

- **Update interval in seconds**: Sets the refresh rate for the "Last edit" value. By default, this date is updated every 10 seconds via JavaScript.

BlueSpiceAuthors

*BlueSpiceAuthors*, together with *BlueSpiceArticleInfo* and *BlueSpiceReaders*, is part of the *Page information* in the quality management tools.

- **Display authors**: Show or hide authors on the page information page.
BlueSpiceAvatars

An avatar image is automatically generated if the user does not upload a profile picture or if the user decides to create an avatar image in the preferences.

- **Generator**
  - **InstantAvatar**: Generates an avatar image based on using the initials of the Real name or the Username
  - **Identicon**: Generates an avatar image based on parts of the user’s IP address.

BlueSpiceBookshelf

- **Use the display title from book source on article**: Shows the title from the book navigation as page title instead of the page name.
Note: If the page additionally contains a {{DISPLAYTITLE}} tag, the display title of the page is shown instead of the book title.

- Prepend article table of contents and headlines with book numberation
- Suppress namespace prefix of book articles in output

BlueSpiceChecklist

- **Mark checklist changes as minor edit:** If this setting is active, changes to a checklist (for example, checking a checkbox) in view mode are logged as minor edits. If this setting is inactive, a change to the checklist is recorded as a regular version in the page history.

BlueSpiceExtendedSearch

- **External file paths:** External locations to scan for and index files from. These locations are entered in key/value pairs of Physical path and URL prefix.
  - **Physical path:** Storage path. For mounted drives, for example: X:\Documents
  - **URL prefix:** All files indexed from the indexed physical location are prefixed in the search results. It should be used if files are available from a web server. By default, the URL prefix is set to the same value as Physical path.
- **Use simple autocomplete:** forces a more compact autocomplete (1-column layout, no thumbnail preview).
- **Automatically set language filter**: This setting applies to multi-language wikis. It returns search results for a user only in the user's language. Users can set their language in their preferences.
- **Exclude patterns**: Files at external file locations can be excluded from search based on regular expression patterns.

**BlueSpiceExtendedStatistics**

- **Exclude these users**: Some user groups, like WikiSysop, can skew the statistics, for example the statistics for search queries or because they complete automated maintenance tasks. These types of user groups can be excluded from the statistical results.

- **Maximum number of interval steps**: Sets the size of the x-axis for the results. For a few days, select the interval Day or Calendar Week, for periods over one year, select Year or Month. If you do not get any results for your query, try to adjust the interval accordingly.

**BlueSpiceInsertCategory**

- **Insert category with its parents**
- **Set page categories as default in upload dialog**
BlueSpicensertLink

- **Allow unmapped links**
- **Allowed locations for external files**
  - Filesystem prefix
  - Web accessible prefix:

BlueSpicePageTemplates

- **Force target namespace:**
- **Hide default templates:** Hides the default *Empty page* template.

BlueSpicePermissionManager

- **Backup limit:** Sets the number of backups for the permissions manager. Each time the page *Special: PermissionManager* is saved, a backup is created. If the backup limit is set to 5, the last five versions of the permissions configuration are saved as backups.

BlueSpiceReaders

- **Number of readers to display:** Sets the number of readers that are displayed on the Page information in the Quality management tools.

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BlueSpiceSaferEdit

- **Interval for lookup for concurrent editings:** Sets the time in seconds for checking if another person is editing the page.
Show name of current editor: Shows or hides the name of the user who is currently editing the page.

BlueSpiceUEModuleBookPDF

Table of Contents

- Only article titles (indent by grade): Only shows the article titles in the main contents table of the PDF.

PDF table of contents without article TOCs

Embed article TOCs (No indent of article titles): Shows the table of contents for each article in the main contents table of the PDF.

Embed article TOCs

BlueSpiceUEModuleHTML

- Hide namespace prefix in PDF: If activated, the namespace is shown in the HTML main heading.

Note: If the page contains a "displaytitle" tag in the page source, the page display title is shown and this setting has no effect.
BlueSpiceUEModulePDF

- **Hide namespace prefix in PDF**: If activated, the namespace is shown in the PDF main heading for a page.

  ![Namespace in heading](image)

  **Note**: If the page contains a “displaytitle” tag in the page source, the page display title is shown and this setting has no effect.

BlueSpiceUniversalExport

- **Metadata (standard, JSON)**: Additional data to be passed to the rendering template in JSON format. This data can be used in the export template. The template itself is maintained server-side.
- **Metadata (override, JSON)**: Allows overriding standard data sent to the rendering template in JSON format. Values that are set by default can be overridden with this option.

BlueSpiceVisualEditorConnector

- **Enable VisualEditor for BlueSpice extensions**
- **Configuration variable to use a simplified save process**
- **Upload type**
  - Original (Here a confirmation of the rights of use/upload is obtained, file name and namespace of the file can be changed, a category can be assigned and a description of the file MUST be given).
  - Simple (No confirmation of required rights is obtained here, the name and namespace of the file can be changed, a description and a category can be assigned, but does not have to be specified)
  - One click (No confirmation about required rights is obtained here, the image cannot be renamed and no category can be assigned. Only the namespace can, but does not have to be adjusted before uploading)
BlueSpiceWhoIsOnline

- **Time in seconds until a user is marked as offline**: The system checks every $x$ seconds if a user logged out and no longer displayed as online. This can be less frequent than the update interval for newly logged-in users.
- **Update interval in seconds**: The system checks every $x$ seconds for users.

BlueSpiceExpiry

- **Show watermark for expired pages in PDF**: Shows the watermark for expired pages in PDFs.
- **Show watermark for expired pages in print version**: Shows the watermark for expired pages when a page is printed.
- **Show watermark for expired pages**: Shows a watermark on the page itself.

BlueSpiceReview

- **Only the owner of a review can change it**: If this is unchecked, any user with edit rights can update a workflow.

BlueSpiceReviewExtended

- **Workflow will be added to page history**: This enables that workflow votes are listed under the page history with the corresponding version.

workflow log entries in page history
BlueSpiceFlaggedRevsConnector

Export

The export settings affect how the pages of a book are generated in the PDF export.

- **Bookshelf: List accepted revisions log**: Shows a log of stable page versions of pages in the PDF and when these pages were put into accepted status. If editors did not provide a comment when accepting the page, the *Stable comment* field for a revision is empty.

  ![accepted revisions log](image)

- **Bookshelf: List pages without stable revision**: Displays a list of PDF pages at the beginning of the PDF that only exist as a first draft and have no released version.

  ![Not stable pages](image)

- **Bookshelf: List pages without FlaggedRevs**: Displays a list of PDF pages that do not have a release mechanism at the beginning of the PDF.

  ![Not FlaggedRevs namespace](image)

- **UEModulePDF: Show FlaggedRevs info below main heading**: Prints the latest revision dates (last acceptance and last edit date) below the heading.
Quality assurance

- **Automatically set the page to stable, when the workflow was finished successfully:** The workflow ends with setting the page status to stable.
- **Automatically delete the workflow, when a page was marked as stable:** The workflow is deleted.
- **Show unstable pages for following groups:** If the group *user* is removed from the BlueSpiceFlaggedRevs configuration, users in this group will not be able to see draft versions when they are added as reviewers in a review process. When the group user is removed, only *sysop* and *reviewer* users can access drafts. If you want other groups, for example *editor*, to see draft versions, you need to add them to the configuration. If no user groups are specified in the configuration field, not even reviewers and sysops users will see a visual status indication of a page. They will have access to drafts through the revision history for the page instead.

Searching and Navigation

- **Indexing only stable versions:** Draft versions are excluded from the search results. If a page does not have a stable version, it is not shown as a search result.

BlueSpiceSocialBlog

- **Use teaser text for blog entries in the timeline:** When you create a blog entry, you can create a teaser text for it by clicking the cogwheel symbol in the blog entry form. If this setting is active, the teaser text will be shown on the page *Special:Timeline* instead of the first part of the content.
BlueSpiceSocialTopics

- **Automatically create all discussion pages.** If a user creates the first discussion topic for a page using the link in the page footer of a wiki page, the needed discussion page is automatically created first.

  ![Create discussion topic](image)

  A message "This discussion page was created automatically" is inserted on the discussion page.

If this setting is deactivated, the user is directed to the "Create page" default page first.

BlueSpiceMatomoConnector

- **Site ID:** Matomo ID of the wiki. You can find the site ID as a url parameter in the browser address bar when you are logged into Matomo.

  ![Matomo ID](image)

- **Base url:** The url to your Matomo installation.

- **Show opt-out link in footer:** Displays a link in your wiki footer, usually named *Analysis service.*
On the Analysis service page, there is a checkbox that allows a user to opt-out from being tracked for analysis purposes.

You may choose to prevent this website from aggregating and analyzing the actions you take here. Doing so will protect your privacy, but will also prevent the owner from learning from your actions and creating a better experience for you and other users.

☑ You are not opted out. Uncheck this box to opt-out.

Related info

- Reference:ConfigManager