

## Workflows

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## Introduction

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In BlueSpice 4.1, workflows are based on [BPMN 2.0](#). Four different types of page-based workflows are already integrated. Their purpose is a page review to obtain feedback via a user vote or to trigger a page approval. In the following, these workflows are therefore called review workflows.

### Types of reviews

Workflow type	Participants	Description
<a href="#">Single user approval</a>	1 user	A single user is asked to vote about a page. If a user submits a positive vote, the page is automatically approved.
<a href="#">Expert document control</a>	3 users	After a page has been edited by a specific user, the page is reviewed by an expert and then approved by a user who is responsible for approvals.
<a href="#">Group feedback</a>	1 group	A group (which needs to exist in the group manager) is requested to leave a comment on a page.
<a href="#">Single user feedback</a>	1 user	A user is asked to send a comment regarding a page.

## Notifications and reports

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- **When a task gets assigned:** When a user needs to complete a workflow task, both a notification and a [task](#) are created.
- **At the end of a workflow:** After a workflow has ended, the initiator receives a notification and an email is sent to a report recipient (as defined at the beginning of the workflow).
- **When a workflow gets aborted:**
  - A notifications are sent to users with a pending workflow task
  - A notifications are sent to the originator if a workflow got aborted
  - Participants of past or future steps don't receive a notification

## Workflow activities

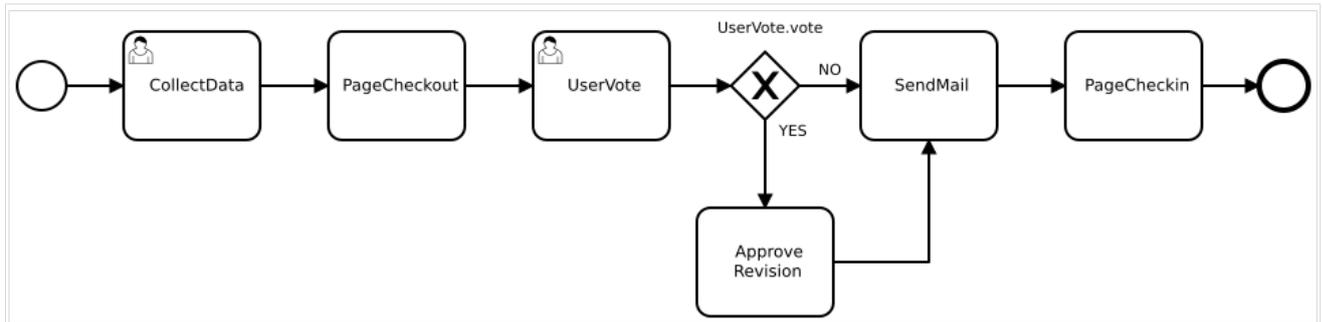
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All approval workflows start with a form where the necessary workflow data is entered by the workflow initiator. Each workflow results in one or more workflow activities.

### Single user approval

**Purpose:** Approval of a draft page by a user with approval rights. This workflow only makes sense if the approval function ([FlaggedRevs](#)) is activated on a page.

**Workflow instances:** Only one approval workflow can run per page.



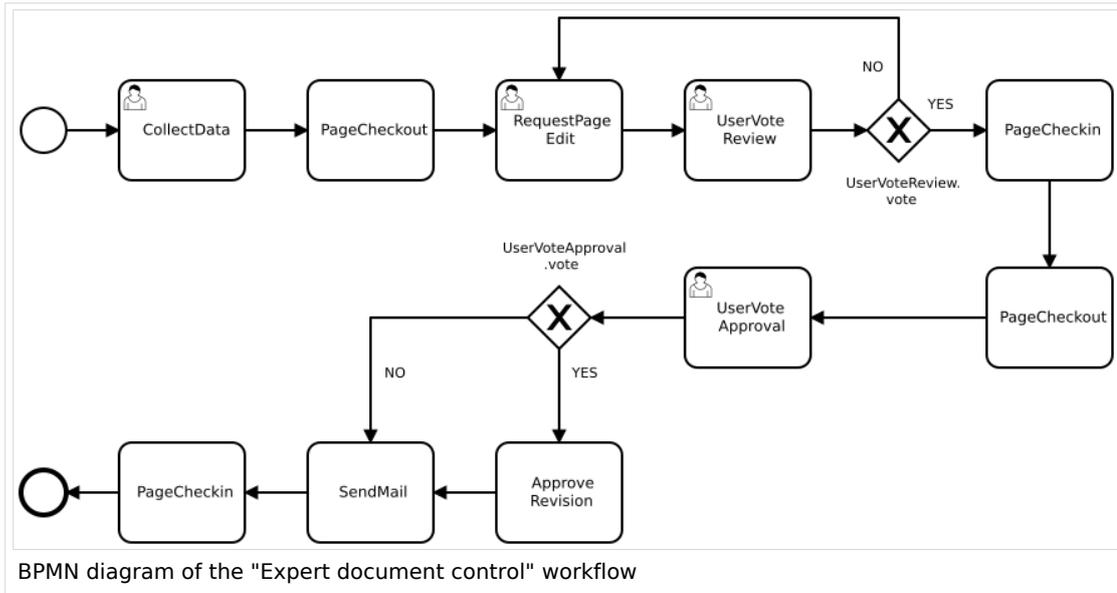
BPMN diagram of a "Single user approval" workflow

Activity	Description
CollectData	In the first workflow step, the workflow initiator enters the settings: <ul style="list-style-type: none"> <li>• <i>User</i>: ser who is assigned to the task.</li> <li>• <i>Instructions</i>: A comment or instructions for the user to understand the task.</li> <li>• <i>Send report to</i>: An email report with the results will be sent to this email address when the review is finished. If a username is specified here, an email address must be stored in the user administration so that the report can be sent.</li> </ul>
PageCheckout	The page is locked for editing by other wiki users. Only the user with the workflow task can edit while this workflow is running.
UserVote	The assigned user carries out a vote and either accepts the page or rejects it. Alternatively, the task can be delegated. In the event of a rejection, the workflow skips the next step (ApprovePage).
ApprovePage	<b>Only if</b> the user has submitted a positive vote (accept), the page is set to an approved state.
SendMail	An email report is sent to the report recipient who was specified in the first step.
PageCheckin	The page is unlocked.

## Expert document control

**Purpose:** Approval of a draft page according to the "4-eyes principle".

**Workflow instances:** A page can only have one approval workflow at a time.



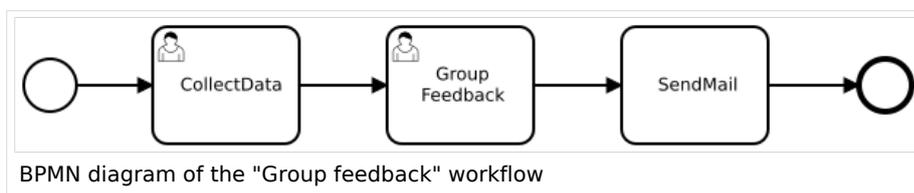
Activity	Description
CollectData	<p>In the first workflow step, the workflow initiator enters the settings:</p> <p><i>User:</i> User who is assigned to a task. Three different users have to be specified: <b>Editor</b>, <b>Reviewer</b>, <b>Approver</b></p> <p><i>Instructions:</i> A comment or instructions for the users to understand their tasks.</p> <p><i>Send report to:</i> An email report with the results will be sent to this email address when the review is finished. If a username is specified here, an email address must be stored in the user administration so that the report can be sent.</p>
PageCheckout	<p>The page is locked for users who do not participate in the workflow. Only the <b>Editor</b> (first workflow participant) and <b>Reviewer</b> (second participant) of the workflow can edit the page during checkout.</p>
EditPage	<p>The <b>Editor</b> user can edit the page and completes the task without comment.</p>
UserVote	<p>After the <b>Editor</b> step has been completed, the <b>Reviewer</b> user can edit the page and submit a vote. As an alternative, the <b>Reviewer</b> can delegate the task. If the vote is positive (Approve), the workflow continues. If the <b>Reviewer</b> rejects, the workflow goes back to the <b>Editor</b>.</p>
PageCheckin	<p>After the <b>Reviewer</b> submits a positive vote (accept), the page is checked in and the workflow continues.</p>

Activity	Description
PageCheckout	In this step, the page checkout locks the page for editing completely. The <b>Approver</b> user will not be able to change the page, but needs to approve it.
ApprovePage	The Approver can either complete or delegate the task. After the <b>Approver</b> (or the delegate) finishes the assigned task, the page is set from "draft" to "approved" status if the page was in draft status (only if the approver submits a positive vote). If not, this step is skipped.
SendMail	If an email or user was specified in the workflow settings, the report is now getting sent to that user.
PageCheckin	The page gets unlocked for editing.

## Group feedback

**Purpose:** Obtaining feedback from the members of a user group. The group must exist in the [group manager](#).

**Workflow instances:** Several feedback workflows can run independently of one another on one page at the same time.

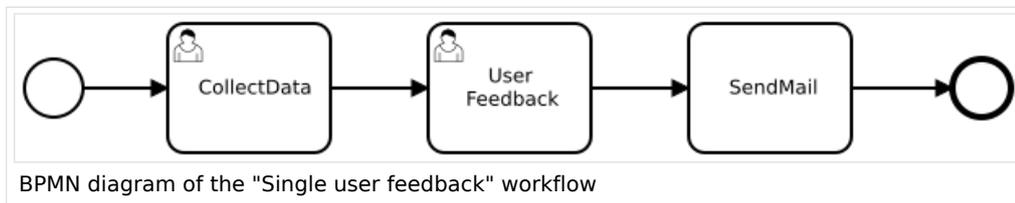


Activity	Description
CollectData	In the first workflow step, the workflow initiator enters the settings: <ul style="list-style-type: none"> <li><i>Group:</i> User group who is assigned to the task.</li> <li><i>Instructions:</i> A comment or instructions for the users to understand their task.</li> <li><i>Send report to:</i> An email report with the results will be sent to this email address when the review is finished. If a username is specified here, an email address must be stored in the user administration so that the report can be sent.</li> </ul>
GroupFeedback	All users in the assigned group provide feedback via a comment field. This is a parallel workflow, which means that the order of the feedback does not matter.
SendMail	If an email or user was specified in the workflow settings, the report is now getting sent to that user.

## Feedback

**Purpose:** Obtaining feedback from a single user on a page.

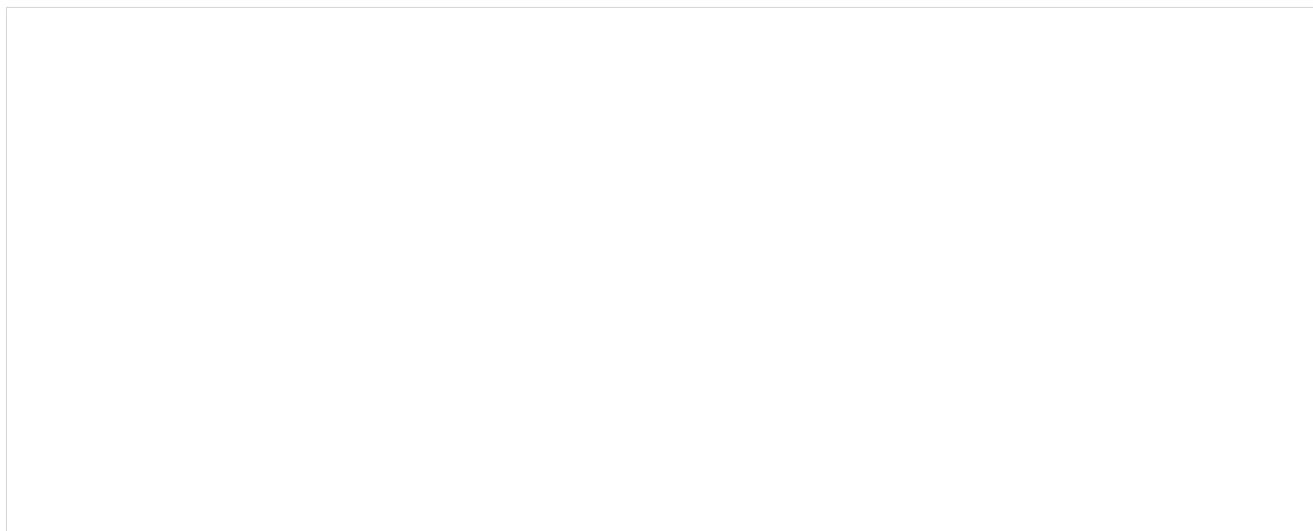
**Workflow instances:** Multiple feedback workflows can run independently of one another on one page at the same time.



Activity	Description
CollectData	In the first workflow step, the workflow initiator enters the settings: <ul style="list-style-type: none"> <li>• <i>User:</i> User who is assigned to the task.</li> <li>• <i>Instructions:</i> A comment or instructions for the users to understand their task.</li> <li>• <i>Send report to:</i> An email report with the results will be sent to this email address when the review is finished. If a username is specified here, an email address must be stored in the user administration so that the report can be sent.</li> </ul>
UserFeedback	The assigned user sends a comment.
SendMail	If an email or user was specified in the workflow settings, the report is now getting sent to that user.

## Overview page

All workflows in the wiki are listed on the page *Special:Workflows overview*. A view for all *active* workflows and a view for *all* workflows can be selected.



Workflows related to this page						
Type	Subject page	Current tasks	State	Started on	Last activity on	
Group Feedback	Main Page	-	Aborted	14:47, 29 November 2021	14:49, 29 November 2021	<a href="#">see details</a>
Single user feedback	Main Page	-	Finished	15:43, 3 November 2021	15:43, 3 November 2021	<a href="#">see details</a>
Expert document control	Main Page	UserVoteReview	Active	12:20, 21 December 2021	12:20, 21 December 2021	<a href="#">see details</a>
Single user feedback	Main Page	-	Finished	16:34, 20 December 2021	17:13, 20 December 2021	<a href="#">see details</a>

Workflows overview page

## Tasks overview

Users are informed about new and pending tasks in their notifications. They can view assigned workflows on their *My tasks* page.

## How to add a custom workflow

Users can upload an xml-file of a BPMN diagram with custom activities to the wiki. Currently, the following predefined activities exist:

### Extension: Workflows

- [CustomForm](#)
- [UserVote](#)
- [GroupVote](#)
- [UserFeedback](#)
- [GroupFeedback](#)
- [SendMail](#)
- [EditRequest](#)

### Extension: PageCheckout

- [PageCheckOut](#)
- [PageCheckIn](#)

### Extension: BlueSpiceFlaggedRevsConnector

- [ApprovePage](#)

Example of a customized workflow (coming soon)

➔ [Technical Reference: Workflows](#)