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Workflows

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Introduction

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
Single user approval	1 user	A single user is asked to vote about a page. If a user submits a positive vote, the page is automatically approved.
Expert document control	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.
Group feedback	1 group	A group (which needs to exist in the group manager) is requested to leave a comment on a page.
Single user feedback	1 user	A user is asked to send a comment regarding a page.

Notifications and reports

- 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 worfklow: 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:
 - O A notifications are sent to users with a pending workflow task
 - O A notifications are sent to the originator if a workflow got aborted
 - O Participants of past or future steps don't receive a notification

Workflow activities

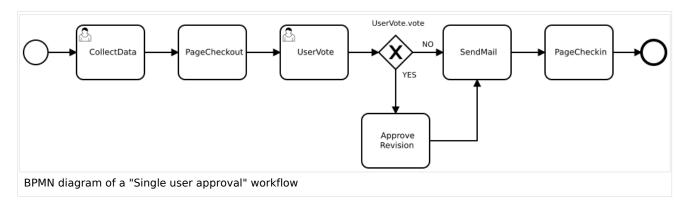
All approval workflows start with a form where the necessary workflow data is entered by the workflow initiator. Each workflow results in one or more workflow activities.

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.



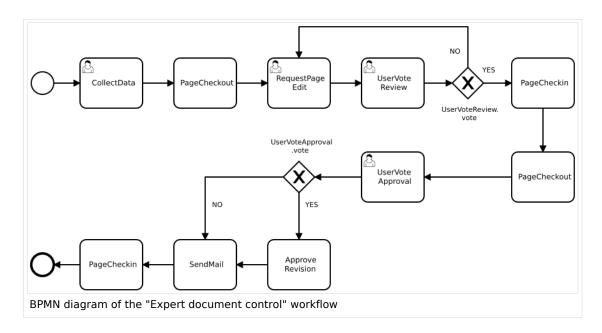
Activity	Description
CollectData	 In the first workflow step, the workflow initiator enters the settings: User: ser who is assigned to the task. Instructions: A comment or instructions for the user to understand the task. Send report to: An email report with the results will be sent to this email address 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.
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	Only if 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 worfklow at a time.





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

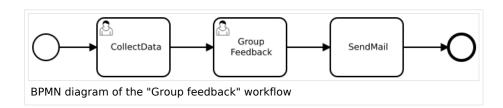


Activity	Description
PageCheckout	In this step, the page checkout locks the page for editing completely. The Approver user will not be able to change the page, but needs to approve it.
ApprovePage	The Approver can either complete or delegate the task. After the Approver (or the delegate) finishes the 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.



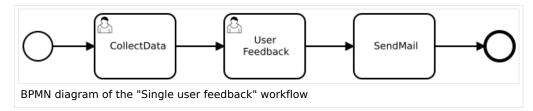
Activity	Description
CollectData	 In the first workflow step, the workflow initiator enters the settings: Group: User group who is assigned to the task. Instructions: A comment or instructions for the users to understand their task. Send report to: An email report with the results will be sent to this 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.
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 worfklows can run independently of one another on one page at the same time.

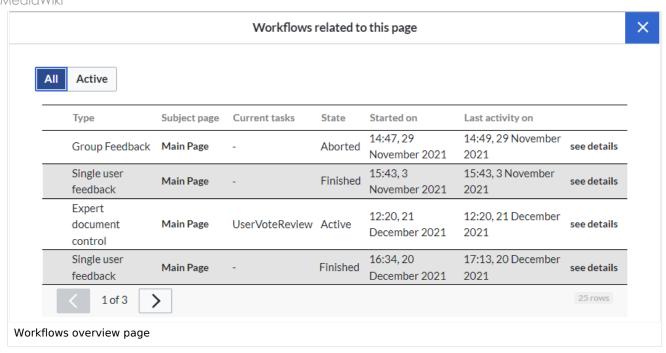


Activity	Description
CollectData	 In the first workflow step, the workflow initiator enters the settings: User: User who is assigned to the task. Instructions: A comment or instructions for the users to understand their task. Send report to: An email report with the results will be sent to this email 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.
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.





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

Manual: Extension/Workflows/Activity/ApprovePage

Description

The ApprovePage activity will set the status of a page from draft to approved status. Flagging will be done with a special user-context to avoid permission errors. This activity can ony be used with pages that have the approval feature (FlaggedRevs) enabled.

Short profile	
Name	ApprovePage
Async	Yes
BPMN type	bpmn:Task
BPMN Extension Element "wf: type"	approve_revision

Properties

Name of property	Description	Туре
comment	The comment to be saved with the approval	string
revision	The revision ID to approve. If not provided explicitly, the page revision of the workflow context will be used, which may be outdated.	int

Manual: Extension/Workflows/Activity/CustomForm

Workflows



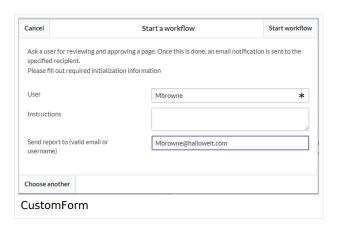
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Description

The *CustomForm* activity is a generic activity, which is based on a custom form. It collects data for the corresponding workflow, which shall be executed. Therefore, the input fields depend on the type of workflow, which is chosen by the user. In general, the data is always the same and differs only in relation to the particular workflow and the number of users required. The *CustomForm* activity mostly include blank values, which can also be inserted by default. This is related to the metadata maintenance associated with the use of wikitext.



	Short profile	
Name	CustomForm	
Async	No	
Input/form	 Input depends on the workflow type, but in general: User picker / Group picker Textfield for comments Textfield for mail / username 	
BPMN Element	bpmn:userTask	
BPMN Extension Element "wf: type"	custom_form	

Extension elements

Name of extension element	Description	Туре
formModule		element
formModule/module	ResourceLoader module to be loaded	string
formModule/class	Form definition class to be shown	string



Example

This would load the ResourceLoader module called my.custom.form and expect it to have a JavaScript class MyCustomForm be implemented. Such a RL module may be provided by an extension, or a custom gadget.

Properties

Name of property	Source	Description	Туре
due_date	UIActivity	Due date for task completion	date/timestamp

Each field provided by the form specified in formModule/class needs to be listed as a property with a default value.

Example

If the form specified in <wf:class> looks like this

```
MyCustomForm = function( cfg, activity ) {
        MyCustomForm.parent.call( this, cfg, activity );
};
00.inheritClass( MyCustomForm, workflows.object.form.Form );
MyCustomForm.prototype.getDefinitionItems = function() {
         return [
                          name: 'username',
label: "Username"
                          type: 'user picker',
                          required: true
                 },
{
                          name: 'comment',
                          label: 'Comment'
                          type: 'wikitext',
                 }
        1;
};
```

the properties can look like this

```
<bpmn:property name="username" />
<bpmn:property name="comment" default="Some default comment text" />
```



Given the activities id specified in the

 connected activities would be able to access the output data in their respective properties like this:

```
<bpmn:task id="SomeActivity">
    ...
    <bpmn:property name="user" default="{{{CollectData.username}}}"></bpmn:property>
    <bpmn:property name="intro" default="{{{CollectData.comment}}}"></bpmn:property>
    ...
```

Manual: Extension/Workflows/Activity/EditRequest

Description

The *EditRequest* activity asks a specified user to edit a page where a workflow is currently running. This activity consists of a form that simply provides information about editing the corresponding page and then submitting the change.

Cancel	Edit request	Submit		
Once you are done editing, click on "Submit" to mark task as completed				
EditReq	uest dialog			

Short profile	
Name	EditRequest
Async	No
BPMN type	bpmn:userTask
BPMN Extension Element "wf: type"	edit_request

Properties

Name of property	Source	Description	Туре
due_date	UIActivity	Due date for task completion	date /timestamp
		Name of the user that should edit a page. Can be	



Name of property	Source	Description	Туре
assigned_user	UIActivity	plain username (e.g. "WikiSysop") or user page ("User:WikiSysop"); Support for User-ID is not required	string
instructions	InstructedActivity	Text that is shown to the user, so he knows what to do; visible in the UI / form but is optional	string

Manual: Extension/Workflows/Activity/GroupVote

Description

The activity *GroupVot*e is responsible for collecting necessary data about the voting of a group on a special topic. Unlike the UserVote, it is not possbile to delegate the task. A user that is part of a group can accept or decline a vote and also leave a comment that justifies their decision. The voting result is determined by whatever threshold has been reached first and ends the activity.

Short profile	
Name	GroupVote
Async	No
BPMN type	bpmn:userTask
BPMN Extension Element "wf: type"	group_vote

Properties

Name of property	Description	Туре
due_date	Due date for task completion	date /timestamp
assigned_group	Name of the user group that should vote; can be plain grouname as used in the DB (e.g. "sysop")	string



Name of property	Description	Туре	
instructions	Text that is shown to the group of user, so they know what to vote about	string	
	Not to be set in the workflow definition. Used to store data during the activities life cycle. E.g.		
users_voted	<pre>[</pre>	string	
	Can be accessed by follow up activitites by e.g. {{ <groupvoteactivityid>.0.userName}}</groupvoteactivityid>		
threshold_yes_unit	can be user or percent - absolute number of users required to a approve a page	user, percent	
threshold_yes_value	number of users or percentage of users required to approve a page		
threshold_no_unit	can be user or percent - absolute number of users required to a reject a page	user, percent	
threshold_no_value	number of users or percentage of users required to reject a page		

Full example

Once one of the thresholds is reached, the activity will be completed and a <bpmn: exclusiveGateway> (referenced by <bpmn:outgoing>) will be called. It will choose its outgoing <bpmn:sequenceFlow> by mapping its name to the "type" of the threshold that has been reached.

In this example, after the first user either voted yes or no, the workflow will simply reach the end point:



```
</bpmn:extensionElements>
                                   <!-- StartEvent -->
                                   <bpmn:startEvent id="TheStart">
                                                    <bpmn:outgoing>FromTheStartToGroupVote</bpmn:outgoing>
                                   </bpmn:startEvent>
                                   <bpmn:sequenceFlow id="FromTheStartToGroupVote" sourceRef="TheStart" ta</pre>
rgetRef="GroupVote"/>
                                                    <!-- Collect group vote -->
                                   <bpmn:userTask id="GroupVote" name="GroupVote">
                                                    <bpmn:extensionElements>
                                                                      <wf:type>group_vote</wf:type>
                                                    </bre></bre>
                                                    <bpmn:property name="assigned group">QM-reviewer/bpmn:
property>
                                                    <bpmn:property name="instructions">Please vote</bpmn:property>
<bpmn:property name="comment"/>
                                                    <bpmn:property name="vote">vote/bpmn:property>
                                                    <bmm:property name="users_voted"/>
<bpmn:property name="due_date">{{#time:YmdHis|now + 7days}}
/bpmn:property>
                                                    <bpmn:property name="threshold_yes_unit">user</bpmn:property>
<bpmn:property name="threshold_yes_value">1</bpmn:property>
<bpmn:property name="threshold_no_unit">user</bpmn:property>
                                                    <bpmn:property name="threshold_no_value">1</bpmn:property>
                                                    <bpmn:incoming>FromtheStartToGroupVote
                                                     <bpmn:outgoing>FromGroupVoteToGatewayGroupVote</bpmn:outgoing>
                                   </br/>/bpmn:userTask>
                                   <br/>coupvoice < sequence Flow id = "From Group Vote To Gateway Group Vote" source Ref = "Groupvoice" source Ref = "G
pVote" targetRef="GatewayGroupVote"/>
                                   <!-- Check on voting -->
                                   <bpmn:exclusiveGateway id="GatewayGroupVote" name="GroupVote.vote">
                                                     <bpmn:incoming>FromGroupVoteToGatewayGroupVote/bpmn:incoming>
                                                     <bpmn:outgoing>FromGatewayGroupVoteToTheEndYes/bpmn:outgoing>
                                          <bpmn:outgoing>FromGatewayGroupVoteToTheEndNo</bpmn:outgoing>
                                   </bpmn:exclusiveGateway>
<bpmn:sequenceFlow id="FromGatewayGroupVoteToTheEndNo" name="no" source</pre>
Ref="GatewayGroupVote" targetRef="TheEnd"/>
                                   <!-- EndEvent -->
                                   <bpmn:endEvent id="TheEnd">
                                                    <bpmn:incoming>FromGatewayGroupVoteToTheEndYes/bpmn:incoming>
                        <bpmn:incoming>FromGatewayGroupVoteToTheEndNo</bpmn:incoming>
                                   </bpmn:endEvent>
                  </bpmn:process>
</br/>definitions>
```

Manual: Extension/Workflows/Activity/SendMail

```
      1 Description
      18

      2 Properties
      19

      2.1 Input
      19

      2.2 Output
      19
```





Description

The *SendMail* activity is a very generic activity. It is meant to send a report via mail after an action has been completed. This could be done after voting, but may also concern other activities in future, for example.

Following a quick overview:

Short profile		
Name	SendMail	
Async	No	
Input/form	-	
Associated to	Approval Workflows, Collect Feedback Workflows	
BPMN type	bpmn:Task	



Properties

Input

Name of property	Source	Description	Туре	Action
assigned_user	UserVote	Name of the user, who casted the vote	string	collect
comment	UserVote	Comment of the user	string	collect
vote	UserVote	Result of the voting (values: YES, NO)	string	collect
reportrecipient	CollectData	Mailadress of the user who was specified to receive an email after the workflow is finished	string	collect
timestamp		Timestamp of the date when mail is sent	timestamp	display
timestamp		Timestamp of the voting	timestamp	display
username		Name of the user, who casted a vote	string	display
groupname		Name of the group, who casted a vote	string	display
vote		Result of the voting	boolean / string	display
comment		Comment of the user concerning a wikipage	string	display

Output

Name of property	Source	Description	Туре	Action
subject	SendMail	Subject of the mail incl. corresponding wikipage affected by previous activity	string	display
body	SendMail	Standardized text in a mail, which includes the name of the user who casted the vote a comment, which was left by the user the voting result	string	display



Extension elements

Name of extension element	Description	Туре
type		

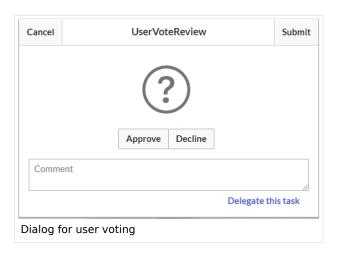
Manual: Extension/Workflows/Activity/UserVote

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3.2 Output	23



Description

The activity *UserVote* is responsible for collecting necessary data about the voting of a user on a special topic. The user who casts a vote has three options: accept, decline and delegate. If a user chooses "delegate", a dialog with a "UserPicker" must be provided. The chosen user must be notified and allowed to vote. The delegatee can re-delegate, but only to the primary user. A notification must be sent again. All delegation actions of the activity must be logged internally and be passed to the next activity.





	Short profile		
Name	UserVote		
Async	No		
Input/form	 Submit / Cancel button Voting button (approve/decline) Textfield for comments Link for delegating the task Userpicker Textfield for comments 		
Associated to	ApprovalWorkflowsFeedbackWorkflows		
BPMN type	bpmn:userTask		



Extension elements

Name of extension element	Description	Туре
form	Name of a *.form page on the wiki	string

Properties

Input

Name of property	Source	Description	Туре	Action
assigned_user	CollectData	Name of the user that should vote. Can be plain username (e.g. "WikiSysop") or user page ("User:WikiSysop"); Support for User-ID is not required	string	none
instructions	CollectData	Text that is shown to the user, so he knows what to vote about; visible in the UI / form	string	display
due_date	CollectData	Due date for task completion	date /timestamp	none
delegate_to	UserVote	Name of the delegated user, that should vote instead of the specified user	string	collect & display
delegate_comment	UserVote	Text that is shown to the delegated user, so he knows what to vote about; visible in the UI / form	string	collect & display



Output

Name of property	Source	Description	Туре	Action
vote	UserVote	Result of the voting (values: YES, NO)	boolean /string	collect
comment	UserVote	Comment of the user	string	collect
timestamp	UserVote	Timestamp of the vote	timestamp	collect
revisionid	UserVote	Revision ID that was voted on	integer	collect

Reference:BlueSpiceGroupManager

Extension: BlueSpiceGroupManager

$_{\bigodot}$ all extensions

	Overview				
Description:	Administration interface for adding, editing and deleting user groups and their rights				
State:	stable Dependency: BlueSpice				
Developer:	HalloWelt	License:	GPL-3.0-only		
Туре:	BlueSpice	Administration			
BlueSpice free, BlueSpice pro, BlueSpice Farm, BlueSpice Cloud BlueSpice free, BlueSpice version: 4.1+					
⊘ View user help page					



Features

GroupManager allows to create new groups, and to edit and delete existing groups.

Using the group concept, you can soften the wiki principle to work with a more granular permissions model. Using groups, administrators can assign different permissions to users. For example, a group can have read permissions, but no edit permissions. Use the group concept wisely, since otherwise the cooperative dynamic suffers.

With the Group manager, you can:

- create groups
- edit groups
- delete groups (system groups cannot be deleted or edited)

Users are assigned to groups in the User manager. Permissions are assigned to groups in the Permission manager.

Technical Information

This information applies to BlueSpice 4. Technical details for BlueSpice Cloud can differ in some cases.

Requirements

MediaWiki: 1.36.0

BlueSpiceFoundation: 4.1

Integrates into

Special pages

GroupManager

Permissions

Name	Description	Role
groupmanager- viewspecialpage	Access to the special page Special: GroupManager	accountmanager, admin, maintenanceadmin

API Modules

bs-groupmanager



Hooks

- LoadExtensionSchemaUpdates
- MWStakeCommonUIRegisterSkinSlotComponents
- MWStakeDynamicConfigRegisterConfigs

Accessibility

Test status:	2-testing complete
Checked for:	Web, Authoring tool
Last test date:	2022-08-05
WCAG level:	AA
WCAG support:	partially supports (workaround: no)
Comments:	keyboard access works. Screenreader: Extjs: Pagination in grids not announcing button labels at top and pagination buttons at bottom; actions menu has no keyboard support. switching between browse/focus modes enables finding out how many pages there are and moving to the next page. erm:27716
Extension type:	core
Extension focus: admin	

Reference:FlaggedRevs

Extension: FlaggedRevs

) all extensions

Overview				
Description: Allows for article content management by editors and reviewers.				
State:	stable Dependency: MediaWiki			



Overview						
Developer:	Aaron Schulz, Joerg Baach	License:	-			
Туре:	MediaWiki	Category:	Quality Assurance			
Edition:	BlueSpice pro, BlueSpice Farm, BlueSpice Cloud	Version:	4.1- 4.2.x			
⊘ View help page						

Features

FlaggedRevs is a MediaWiki extension that activates an approval mechanism.

New versions of an article are initially marked as drafts and remain so until a user with revision rights checks and approves the page.

The MediaWiki extension is customized in BlueSpice. It uses the FlaggedRevsConnector to work alongside workflows, realising the complete functionality of an editorial process with a final approval step.

Warning! The setting FR_INCLUDES_FREEZE for handling the state of included files of an approved wikipage has no long term support by and should not be introduced in a new wiki for that reason.

Reference: Unified Task Overview

Extension: UnifiedTaskOverview

all extensions

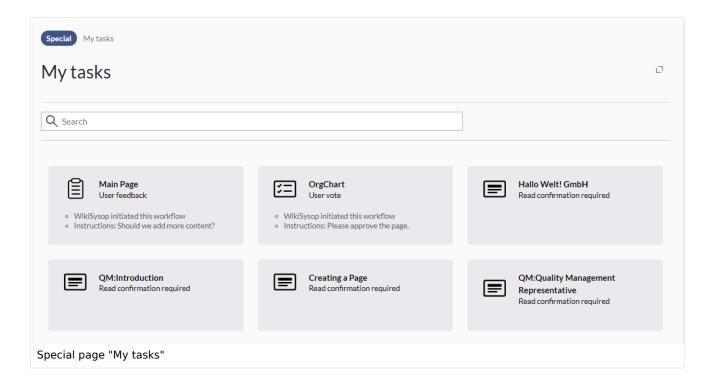
Overview					
Description:	Provides the special page "My tasks"				
State:	stable	Dependency:	MediaWiki		
Developer:	Hallo Welt!	License:	-		
Туре:	MediaWiki	Category:	Personalization		
	BlueSpice pro, BlueSpice				



Overview			
Edition:	Farm, BlueSpice Cloud	Version:	4.1+

The new overview page "My Tasks" (Special:My_tasks) allows users to view their upcoming tasks in the wiki. The special page can be reached via the user menu under *Personal Tools> Tasks*.

- The task list shows workflow tasks and pending read confirmations.
- Tasks can be directly created on a page. v4.4+
- When new tasks exist, a red notification icon in the user menu alerts the user.
- Each task card leads to the wiki page that is linked to the task.



Reference:Workflows

Extension: Workflows

(3) all extensions

Overview			
Description:	Allows to define and execute v	arious workflows	on the wiki
State:	stable	Dependency:	MediaWiki



Overview			
Developer:	Hallo Welt!	License:	GPL-3.0-only
Туре:	MediaWiki	Category:	Quality Assurance
Edition:	BlueSpice pro, BlueSpice Farm, BlueSpice Cloud	Version:	4.1+
View user help page			

Features

Workflow functionality based on BPMN. BlueSpice included some standard workflows. Custom workflows can be created additionally.

Technical Information

This information applies to BlueSpice 4. Technical details for BlueSpice Cloud can differ in some cases.

Requirements

MediaWiki: 1.39.0

Forms: *

OOJSPlus: *

Integrates into

- BlueSpiceDiscovery
- UnifiedTaskOverview
- Workflows

Special pages

WorkflowsOverview

Permissions

Name	Description	Role
workflows-admin	Manage workflows	admin



Name	Description	Role
workflows-execute	Initiate and advance workflows	admin, reviewer, editor
workflows-view	View workflow items	reader

User options

Name	Value
echo-subscriptions-email-workflow-cat	1

Hooks

- ArticleDeleteComplete
- BeforePageDisplay
- BlueSpiceDiscoveryTemplateDataProviderAfterInit
- CodeEditorGetPageLanguage
- ContentHandlerDefaultModelFor
- LoadExtensionSchemaUpdates
- MWStakeCommonUIRegisterSkinSlotComponents
- MWStakeRunJobsTriggerRegisterHandlers
- PageSaveComplete
- SetupAfterCache
- SkinTemplateNavigation::Universal
- UnifiedTaskOverviewGetTaskDescriptors