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Quality management

Um die Qualität einer Wikiseite zu gewährleisten, gibt es zahlreiche Werkzeuge zum Qualitätsmanagement.

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Dokumentenlenkung

In BlueSpice können viele Benutzer Informationen erstellen. Spezialisten können den Inhalt dann überprüfen. Dies stellt sicher, dass die Qualität der Inhalte den Standards Ihrer Organisation entspricht. Dabei ist zu beachten, dass rigide Qualitätskontrollen und -prozesse schnell die Autonomie der Mitarbeiter einschränken. Trotz der Möglichkeit zur Qualitätskontrolle sollten Sie daher immer sicherstellen, dass Sie keine unnötigen Hürden einbauen, die die Akzeptanz des Wikis beeinträchtigen.

Folgende Bereiche sollten für die Qualitätssicherung im Wiki im Auge behalten werden:

1. Document quality (Quality tools, Templates)
2. Content organization (Structure, Portal pages, Queries)
3. Wiki maintenance (Special pages, Processes, Watchlist, Notifications)

Quality tools

BlueSpice free

- Page assignments (5)
- Page information (6)

BlueSpice pro

- Approvals (1)
- Workflow (2)
- Expiry (3)
- Reminder (4)
- Page assignments (5)
- Page information (6)

Template:Message box.

Approval

Wenn die Seiten in einem Namesraum eine veröffentlichte und eine Entwurfsversion haben sollen, muss die Einstellung Freigabe für diesen Namesraum aktiviert werden. Alle Änderungen an einer Seite werden in einer Entwurfsversion erfasst, bis ein Benutzer mit Freigaberechten die Seite akzeptiert.

In der Konfigurationsvewaltung gibt es eine globale Option, mit der festgelegt werden kann, welche Benutzergruppen unveröffentlichte Inhalt lesen dürfen. Standardmäßig können alle angemeldeten Benutzer Entwürfe einsehen.

Eigenschaften

- **Revisionsbasiert:** Unterscheidung zwischen Erstentwurf, Entwurf, und freigegeben
- **Externe Dateien:** Eingebettete Medien und Vorlagen werden "eingefroren"
- **Automatische Freigabe** als Ergebnis einer Begutachtung möglich
- **Leserechte** für Entwürfe können (mit Vorsicht) konfiguriert werden

Mehr Info zu Freigabe

Workflows

Wenn ein dokumentierter Überprüfungsprozess erwünscht ist, können Benutzer einen Workflow starten. Es gibt 4 mitgelieferte Workflows:

- Freigabe
- Qualitätsgesicherte Begutachtung
- Gruppen-Feedback
- Feedback

Eigenschaften

- **Meistens nur eine aktive Begutachtung** pro Seite möglich
- **Zustimmung** oder **Ablehnung** der Teilnehmer bei Freigabe-Worfklows
- **Checkout:** Seite ist in den Freigabeworkflows zur Bearbeitung gesperrt
- **Spezialseite** Workflows Übersicht
- **BPMN-**basiert

Mehr Info zu Workflows

Aktualität

Wenn eine Seite Inhalte mit einem bekannten Lebenszyklus enthält, kann festgelegt werden, dass die Seite an einem bestimmten Datum abläuft. Am Ablaufdatum wird der Seite ein Wasserzeichen "Veraltet" hinzugefügt, wenn die entsprechende Option im ConfigManager eingestellt ist. Darüber hinaus kann eine Erinnerung festgelegt werden, damit der Benutzer eine Benachrichtigung erhält, wenn die Seite abläuft. Der Ablauf kann jederzeit von der Seite gelöscht werden.

Eigenschaften

- **Wasserzeichen** im Seitenhintergrund und im PDF (abhängig von globaler Konfiguration)
- **Übersichtsliste**: *Spezial:Veraltete_Seiten*
- **Erinnerung** beim Erstellen aktivierbar
- **Dauer:** Veraltung ist jederzeit löschbar

Mehr Info zu Aktualität

Erinnerung

Ein Benutzer kann eine Erinnerung für eine Seite erstellen, indem er ein Erinnerungsdatum auswählt und einen optionalen Kommentar hinzufügt. Erinnerungen können von Administratoren auch für andere Benutzer erstellt werden und sind eine schnelle und informelle Möglichkeit, Fälligkeitstermine für seitenbezogene Aufgaben festzulegen.

Eigenschaften

- **Benachrichtigung** über eigene Erinnerungen erhält eine Benachrichtigung (in Benutzereinstellungen deaktivierbar)
- **Wiederkehrende Erinnerungen** möglich
- **Erinnerungsliste:** Spezialseite für Administratoren (unter Globale Aktionen)
- **Schnellzugriff** über das persönliche Benutzermenü

Mehr Info zu Erinnerung

Zuweisung

Seitenzuweisungen bieten die Möglichkeit, einem oder mehreren Benutzern oder Benutzergruppen die redaktionelle Verantwortung für eine Seite zu übertragen. Es ist auch möglich, einen Namensraum so einzurichten, dass zugewiesene Benutzer eine Lesebestätigung für jede größere Änderung an einer Seite abgeben müssen. Da Zuweisungen im Wiki als Seitenattribut zur Verfügung stehen, können sie in semantischen Abfragen verwendet werden.

Eigenschaften

- **Benachrichtigung** bei Änderung der Seitenzuweisung (in Benutzereinstellungen deaktivierbar)
- **Transparenz:** Zugewiesene Benutzer sind in den Seiteninformationen aufgeführt
- **Zuweisungsverwaltung:** Spezialseite für Administratoren
- **Schnellzugriff** auf eigene Zuweisungen über das persönliche Benutzermenü
- **Lesebestätigung möglich:** Zugewiesene Benutzer müssen dann das Lesen von Änderungen an der Seite bestätigen (Namensraum-spezifisch)

Mehr Info zu Zuweisungen

Seiteninformationen

Die Seiteninformationen geben Ihnen einige interessante Statistiken über die Seite. Anhand dieser Informationen können Sie entscheiden, welche Maßnahmen zur Qualitätssicherung der Seite erforderlich sind.Informationen, die auf dieser Seite aufgelistet sind:

- Anzahl der Beobachter der Seite
- Alle Bearbeiter, letzte Bearbeitung
- Eigenschaften: Eingebundene Vorlagen, eingebundene Bilder, interne und externe Links, Kategorien
- Aktualität der Seite
- Autoren der Seite
- Leser der Seite (nur für Administratoren sichtbar)
- Erinnerungen (alle Erinnerungen nur für Administratoren sichtbar, ansonsten eigene Erinnerungen)

Berechtigungen

Diese Berechtigungstabelle zeigt, welche Rollen das erforderliche Recht haben, verschiedene Qualitätssicherungsaktionen durchzuführen. Der Name des Rechts, das eine bestimmte Berechtigung erteilt, wird in Klammern angezeigt:

QM permissions	user (read)	editor	reviewer	admin	intenance-admin	bot
Can create and manage **assignments** for all users *(pageassignments)*			x	x	x	
Can be assigned to a **page** *(pageassigneable)*	x					

Can create and manage **reminders** for all users. *(remindereditall)*			x	x
Can create and manage their own **reminders** *(read)*	x			
Can create and manage **expiry** of pages. *(expire article)*		x	x	x
Can execute **workflows** *(workflows-execute)*			x	

x
x
Can view **workflow** elements *(workflows-view)*
x
Can manage **workflows** *(workflows-admin)*
x
Can **release** *(review)* a page
x
x
x
Own changes are **automatically released** *(autoreview)*
x
x

Rolled-back changes are **automatically released** *(autoreviewrestore)*	
	x
	x

Related info

- Namespace manager
- Workflows

Config manager

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With the Config manager, a wiki user with *sysop* rights can manage wiki-wide settings in one place. In the navigation, it is located at *Global navigation > Management > Configuration*. This link loads the page *Special:BluespiceConfigManager.*

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)

config manager filter

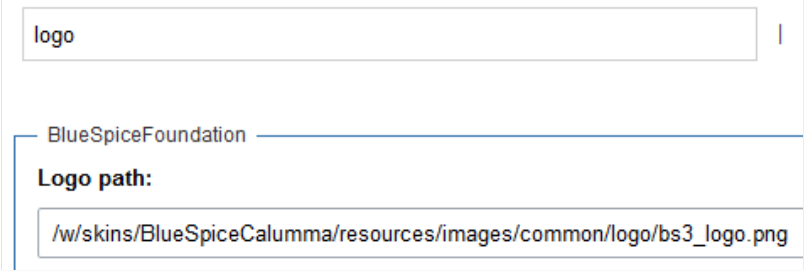
All settings are available in any type of grouping. Changing the grouping type does not add or remove setting options. It just groups them differently. After settings are adjusted, they can be saved by clicking*Save*, or cancelled by clicking *Reset*.

> **Note:** If a server administrator has configured a setting to no longer be writable, it will be shown as greyed-out in the config manager. You will have to talk to your server administrator about changing such a setting.

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

EventBus

Eventbus sends notifications to external urls in case something happens in the wiki. For example, if a page is created, an external service could then be started and create a pdf of that page. See the extension's page on mediawiki.org.

EnhancedUpload v4.3+

Sets the defaults for the advanced image settings when uploading and embedding an image into the wiki via drag-and-drop functionality. The default settings determine the orientation, type, and size of the image. These can be adjusted after embedding via the "Advanced settings" of the image on the page.

Configuration settings for the Enhanced upload

BlueSpiceFoundation

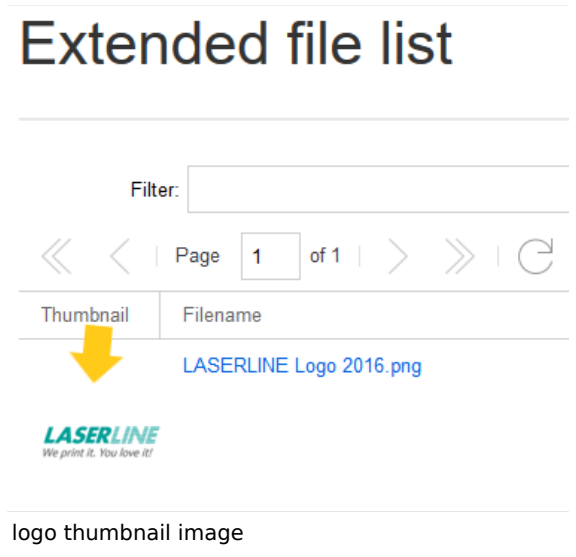
Updating logo and favicon

Note: Since BlueSpice 4.2, the logo and favicon can also be managed via the page Special:Flexiskin together with further skin customizations.

- **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.

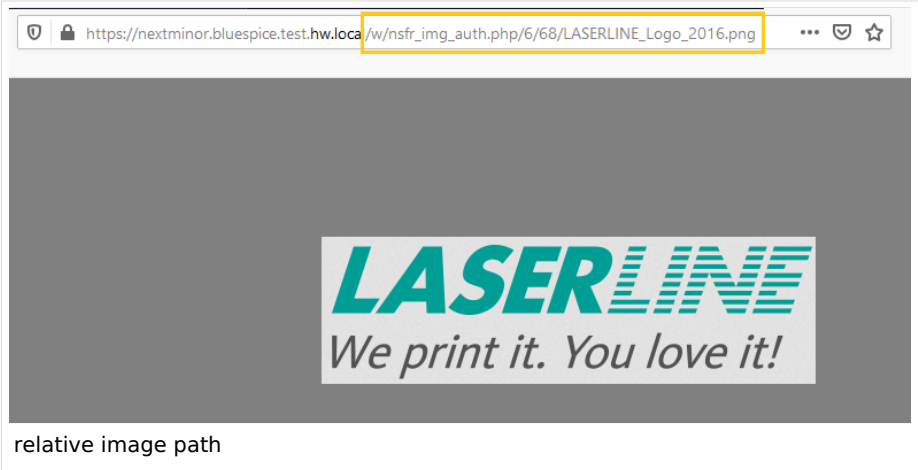
To upload the logo directly in the wiki:

1. **Upload** the logo on the page from the menu *Global actions* > *File list* (*Special:ExtendedFilelist*).
2. **Click** on the thumbnail image of the logo. This opens the logo on a separate page.



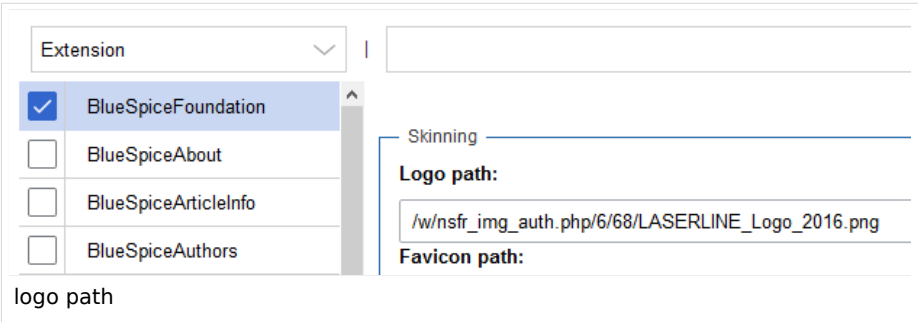
logo thumbnail image

3. **Copy** the relative logo path from the address bar. In a typical Wiki configuration, this path starts with */w/....* .



relative image path

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



logo path

5. **Click** *Save*.

6. **Refresh** the page (Strg+F5).
   If the uploaded logo is too large, you can add the following code snippet to the page *MediaWiki:Common.css*. This automatically adjusts the image to the height of the main toolbar:

```
.bs-logo a {background-size: contain;}
```

- **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*.

System

- **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:$wgFileExtensions for more info.

XML file type: v4.x++
The *xml* file type is blacklisted since MW 1.39 and has to be allowed in *LocalSettings.php*:

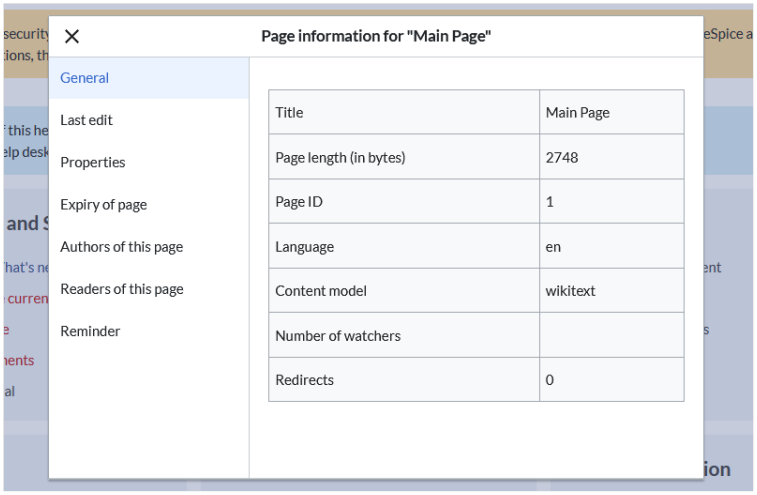
```
$GLOBALS['wgProhibitedFileExtensions'] = array_diff( $GLOBALS['wgProhibitedFileExtensions'] ?? [], [ 'xml' ] );
$GLOBALS['wgMimeTypeExclusions'] = array_diff( $GLOBALS['wgMimeTypeExclusions'] ?? [], [ 'application/xml', 'text/xml' ] );
```

- **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.

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.

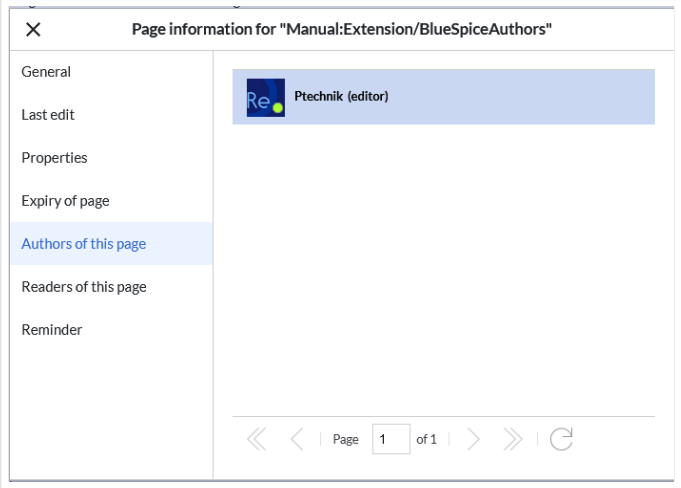


article info

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.



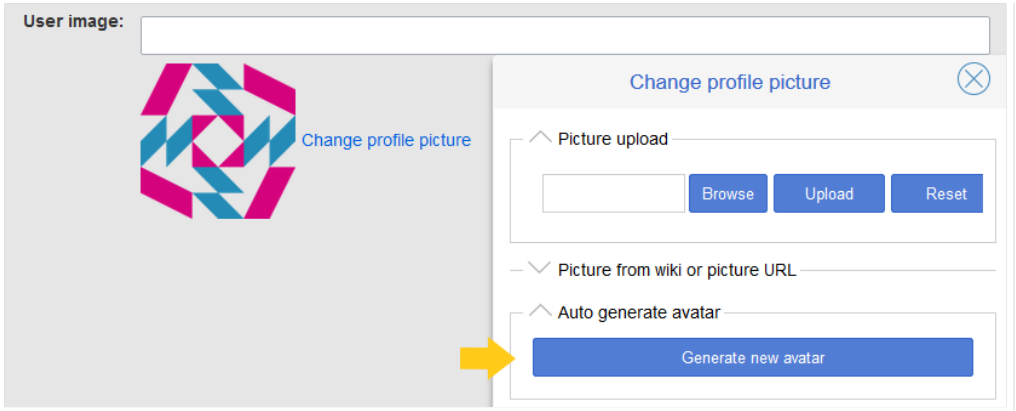
Authors of page

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.

InstantAvatar

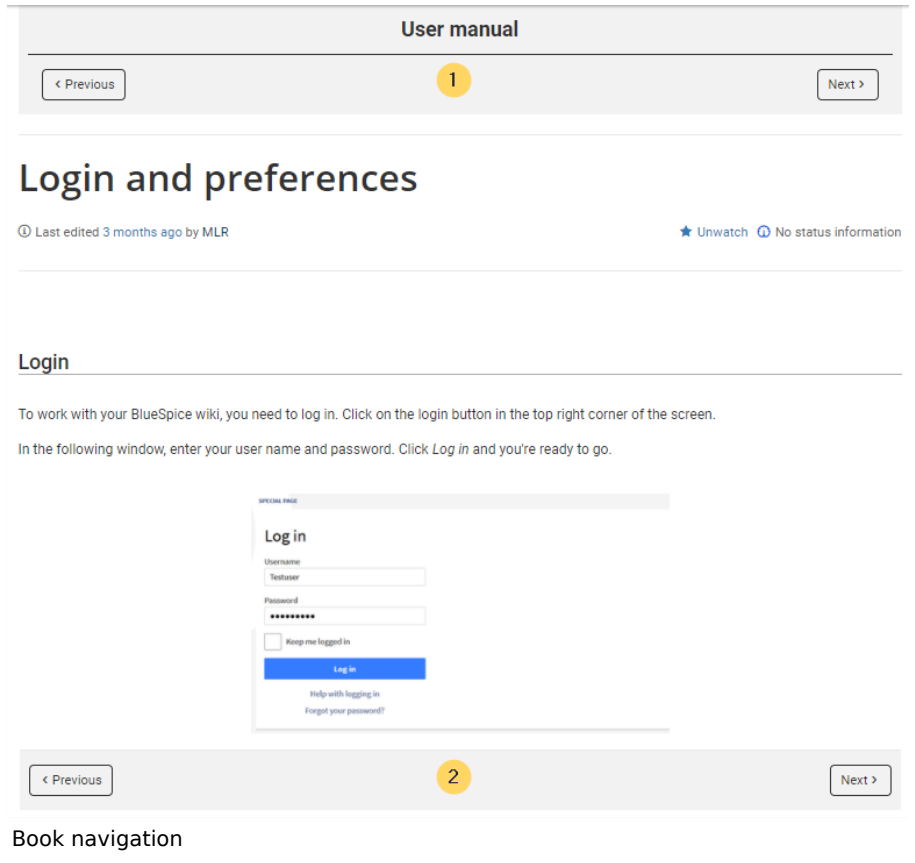
- **Generator**
  - **InstantAvatar:** Generates an avatar image based on using the initials of the Real name or the Username
  - **Identicon:** Generates an avatar image based on parts of the user's IP address.



Identicon

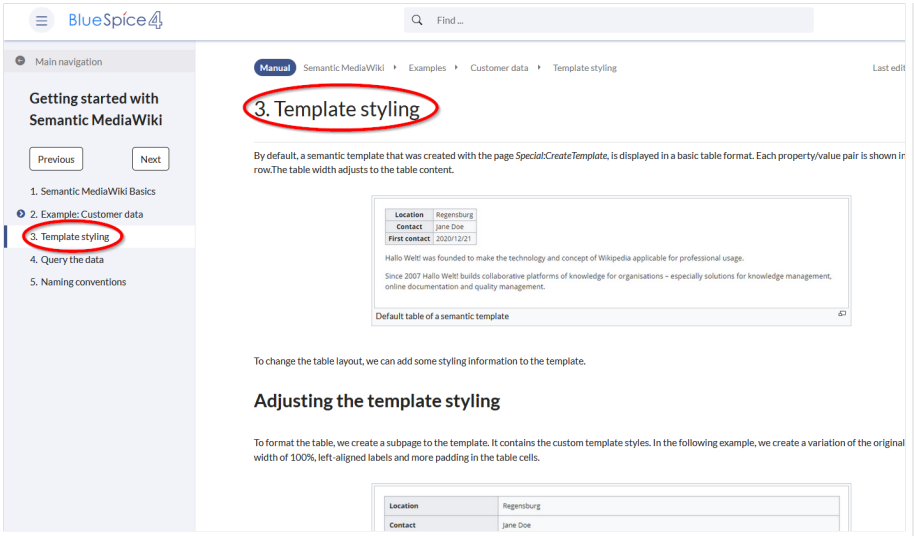
BlueSpiceBookshelf

- **Show book chapter pager after content:** Displays previous/next book page navigation at the end of each book page. (1)
- **Show book chapter pager before content:** Displays previous/next book page navigation at the beginning of each book page. (2)



Book navigation

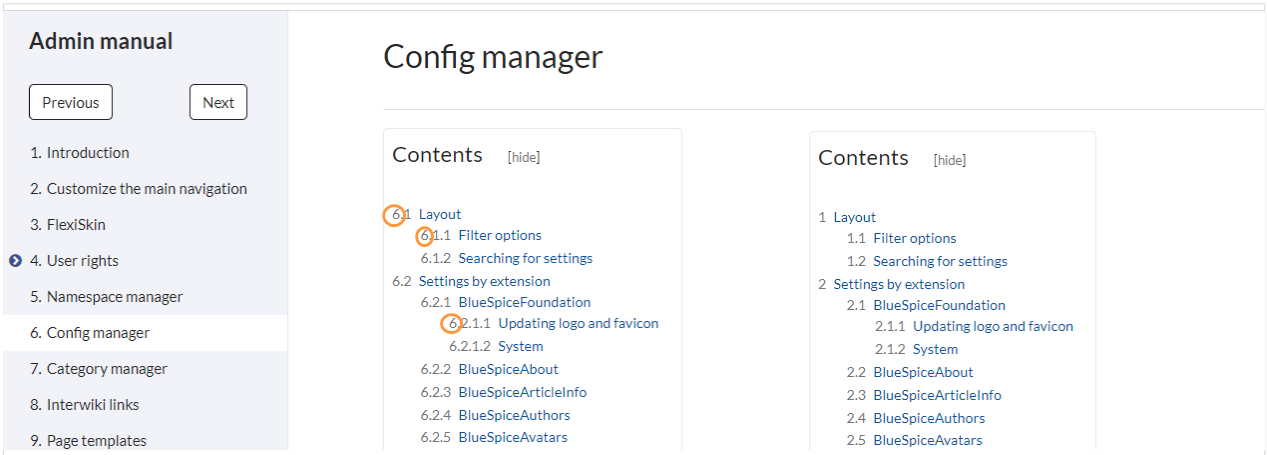
- **Use the display title from book source on article:** Shows the title from the book navigation as page title instead of the page name.



book display title

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:** The page TOC does not start with the main heading 1, but with the actual number from the book chapter (see screenshot). If users have activated in their user preferences to "auto-number headings", the numbering system is matched accordingly.



Prepended chapter numbers

- **Supress namespace prefix of book articles in output:** The namespace prefix of an article is not shown in PDFs.

BlueSpiceChecklist

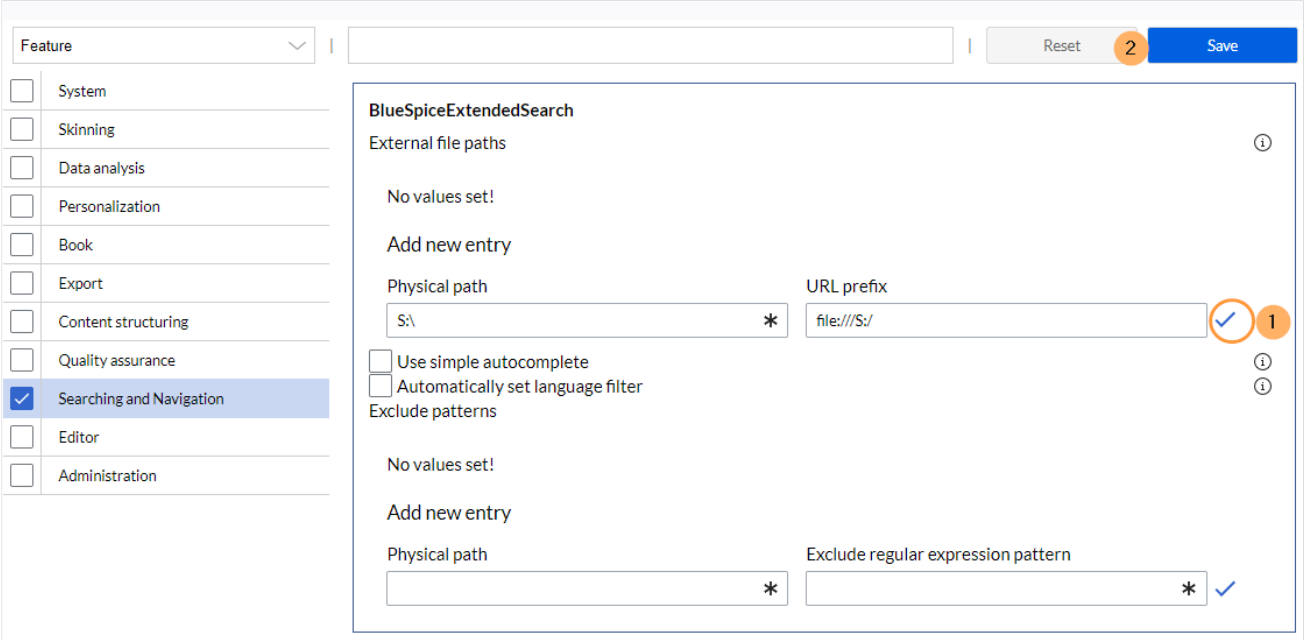
- **Mark checklist changes as minor edit:** If this setting is active, changes to a checklist (for example, checking a checkbox) in view mode are logged as minor edits. If this setting is inactive, a change to the checklist is recorded as a regular version in the page history.

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: S*torage 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*.

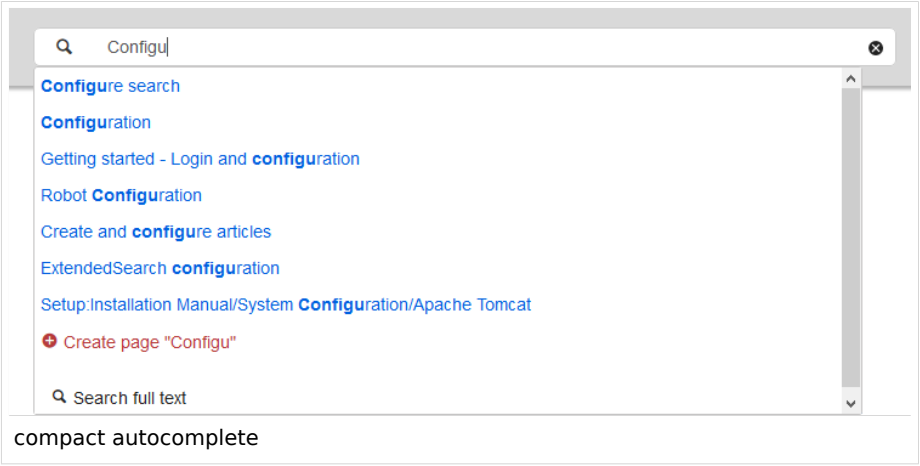
Examples for external file paths

Example file	Phys. Path	URL Prefix	Link in results list
S:\Sales\Info\glossaryy.pdf	S:\	file:///S:/	file:///S:/Sales/Info/glossary.pdf
		https://sharepoint/Sales/documents/	https://sharepoint/Sales/documents/Sales/Info/glossary.pdf
		https://intranet/showdocs/inline.aspx?path=	https://intranet/showdocsinline.aspx?path=/Sales/Info/glossary.pdf
/var/www/bluespice/w/mounted_share/Sales/Info/glossary.pdf	/var/www/bluespice/w/mounted_share/		https://wiki.company.local/w/mounted_share/Sales/Info/glossary.pdf

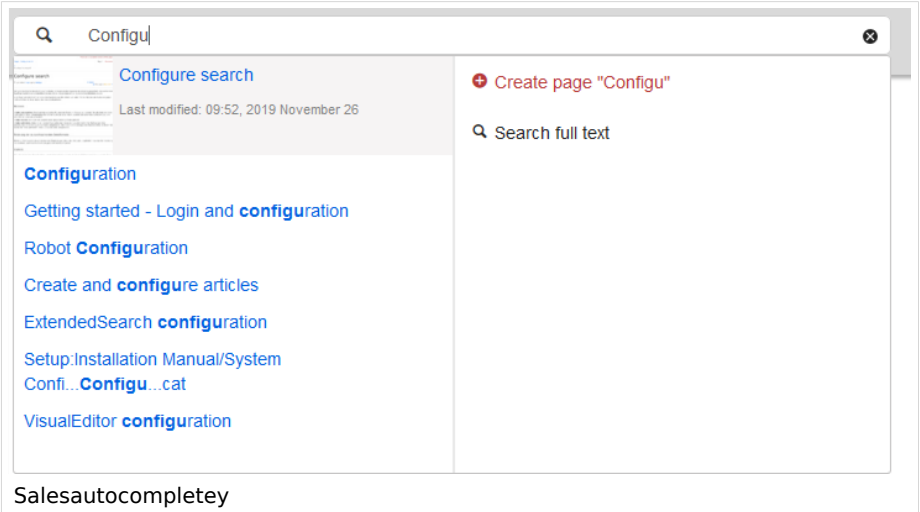


Add an external file path: (1) confirm the checkmark and (2) save the settings.

- **Use simple autocomplete:** forces a more compact autocomplete (1-column Sales thumbnail preview).



compact autocomplete



Salesautocompletey

- **Automatically set language filter**: The search only returns pages whose language (PageLanguage) is identical to the user language (Language). Users can set their language in their preferences. By default, the language of content pages is the same as the installation language (ContentLanguage) of the wiki. Some extensions can set the language of individual pages independently of the content language of the wiki.. (See: https://www.mediawiki.org/wiki/Manual:Language#Page_content_language). In many wikis, activating this filter has little effect.
- **Exclude patterns:** Files at external file locations can be exluded 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 parent categories
- Preset categories of a page in the upload dialog

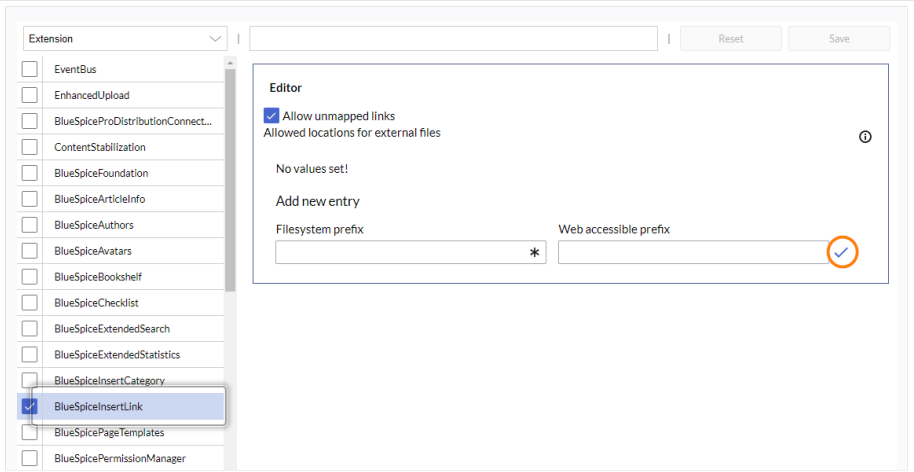
BlueSpiceInsertLink

- **Allow unmapped links:** if there is no prefix in the map, the link will still be inserted. Example: S:\HR. If this setting is unchecked, the link will not be inserted.
- **Allowed locations for external files**:

Example file	Filesystem prefix	Web accessible Prefix	Link output
S:\Sales\Info\glossaryy.pdf	S:\	file:///S:/	file:///S:/Sales/Info/glossary.pdf
		https://sharepoint/Sales/ documents/	https://sharepoint/Sales/ documents/Sales/Info/glossary.pdf
		https://intranet/showdocs inline.aspx?path=	https://intranet/showdocsinline.aspx? path=/Sales/Info/glossary.pdf
/var/www/bluespice/w/mounted_			

Example file	Filesystem prefix	Web accessible Prefix	Link output
share/Sales/Info /glossary.pdf	/var/www /bluespice/w/ mounted_share/		https://wiki.company.local/w /mounted_ share/Sales/Info/glossary.pdf

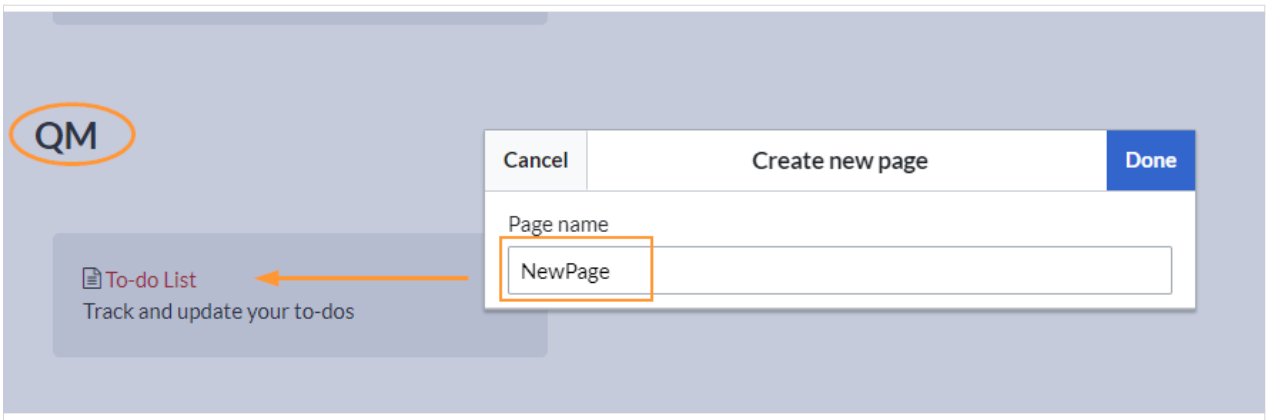
When a new entry is added, it has to be confirmed by clicking the checkmark next to it before saving the page.



InsertLink configuration options

BlueSpicePageTemplates

- **Force target namespace:** The page is always created in the target namespace that is associated with the template, even if the user provided a different namespace prefix. In the screenshot below, the user wants to create the page "NewPage" and then selects a template for the QM namespace. The page is, therefore, created as "QM:NewPage" if this setting is activated.



force the namespace of the template

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

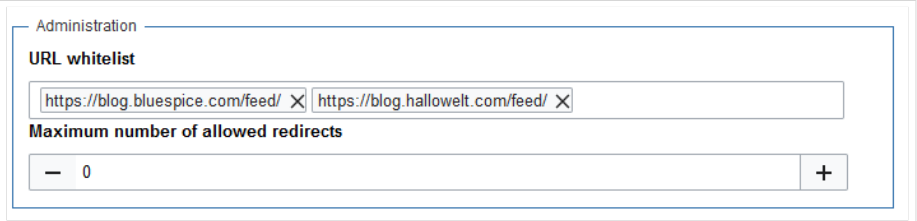
- **Hide template if the page is not to be created in the target namespace:** Depending on the namespace prefix of the page to be created, templates that are associated with other namespaces will not be shown to the user for selection.

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.

BlueSpiceRSSFeeder

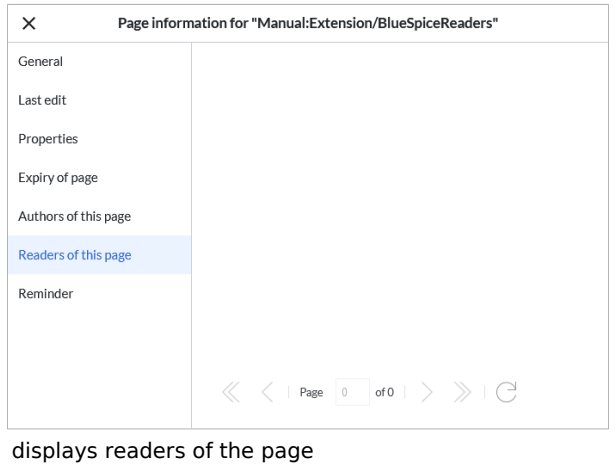
- **URL whitelist:** RSS feeds need to be whitelisted here by an administrator before they can be displayed in a wiki page.
- **Maximum number of allowed redirects:** If there are URL redirects for any of the whitelisted URLs, the number of redirects needs to be adjusted (usually to 1 or 2).



RSS Feed settings

BlueSpiceReaders

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



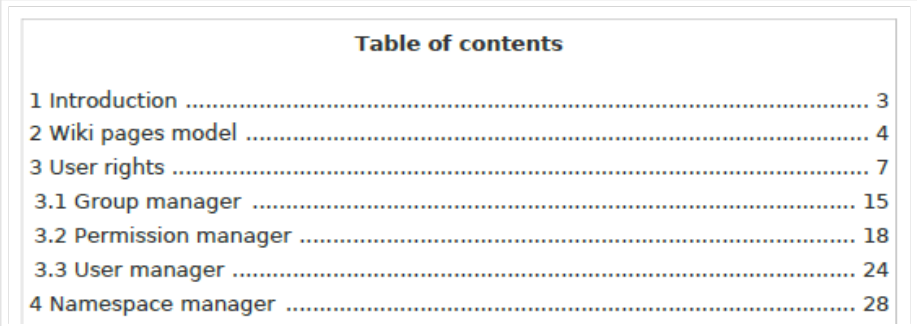
displays readers of the page

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.

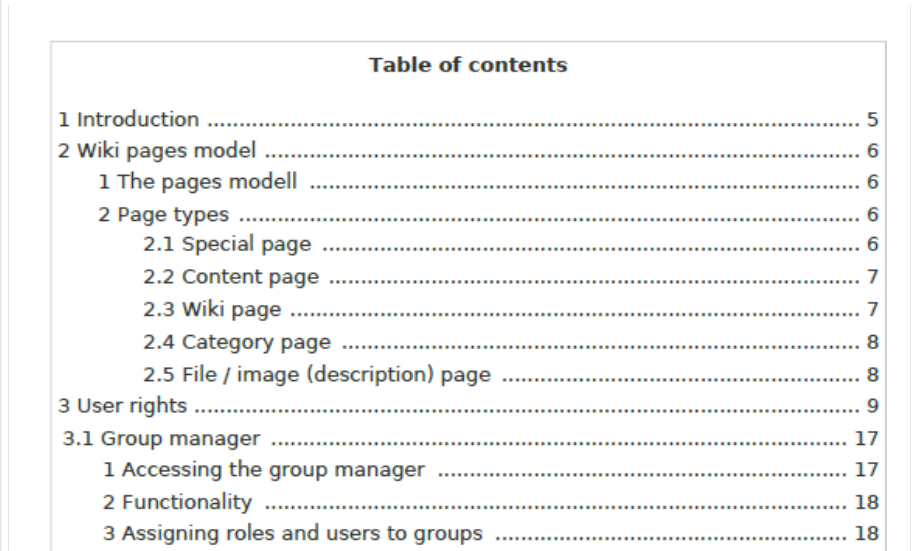
BlueSpiceUEModuleBookPDF

- 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

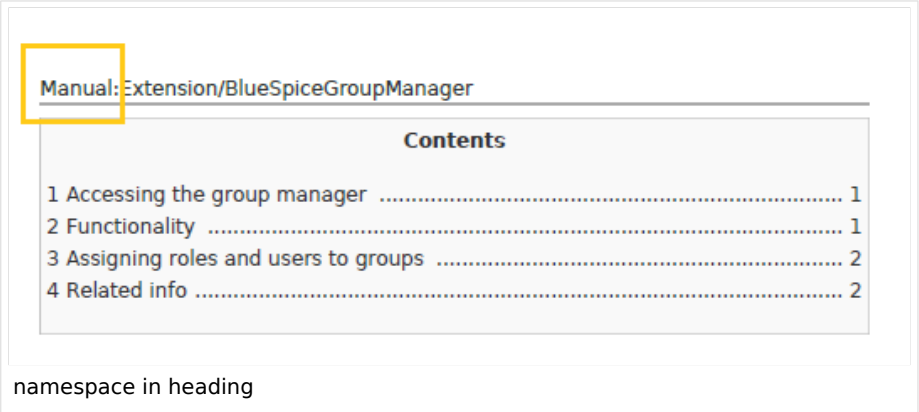
BlueSpiceUEModuleHTML

- **Hide namespace prefix in HTML:** 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

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 maintened 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 overriden with this option.

BlueSpiceVisualEditorConnector

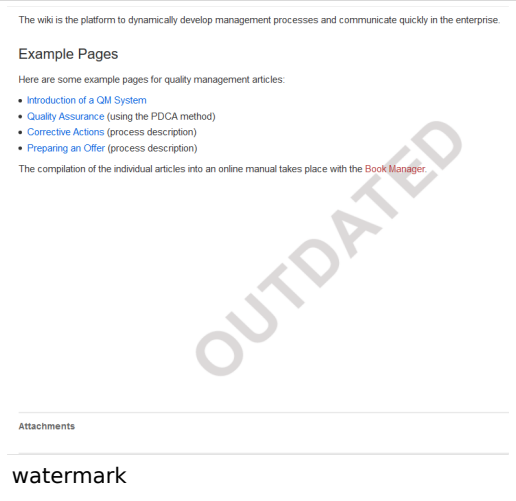
- **Enable VisualEditor for BlueSpice extensions**
- **Configuration variable to use a simplified save process**
- **Upload type**
  - Original (Here a confirmation of the rights of use/upload is obtained, file name and namespace of the file can be changed, a category can be assigned and a description 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 inteval 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.



watermark

BlueSpiceFlaggedRevsConnector

BlueSpiceFlaggedRevsConnector is available up to BlueSpice 4.2.

Export

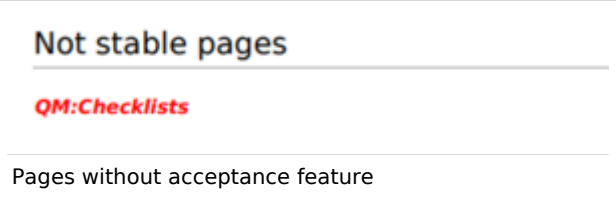
The export settings affect how the pages of a book are generated in the PDF export.

- **Bookshelf: List approved 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.

Stable date	Page	Stable comment
18.11.2019	Permission matrix	
18.11.2019	Permission matrix	
15.11.2019	Wiki pages model	
14.11.2019	Permission manager	
14.11.2019	Group manager	

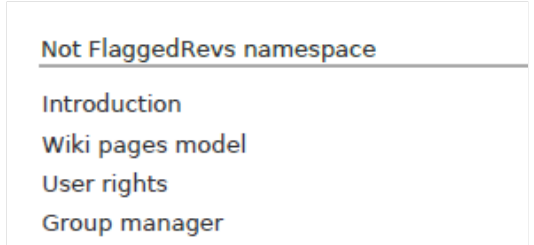
accepted revisions log

- **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.



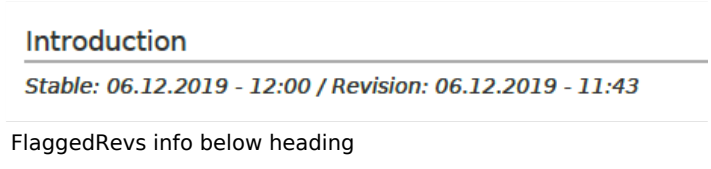
Pages without acceptance feature

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



Pages with no FlaggedRevs feature.

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



FlaggedRevs info below heading

Quality assurance

- **Include handling:** If resources are embedded in a page and those resources are located in namespaces with approval mechanism, then the following settings can be selected. For example: If an approved page contains a template or a file that has been changed after the page itself has been approved, the page will not get another draft version, but instead one of two configurations applies:
  - Current versions: Always show the latest version of the embedded resource.
  - Stable versions: Always show the stable (=approved) version of a resource.
- **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

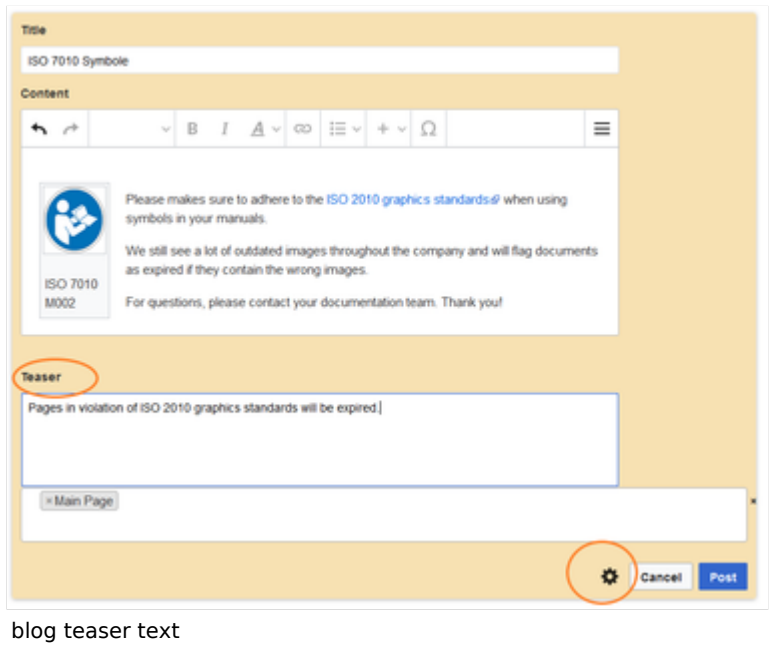
- **Indexing only stable versions:** Draft versions are excluded from the search results. If a page does not have a stable version, it is not shown as a search result.

BlueSpiceSocial

- **Show entrypoint "Timeline":** Shows a link to the page *Special:Timeline* in the main navigation.

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.

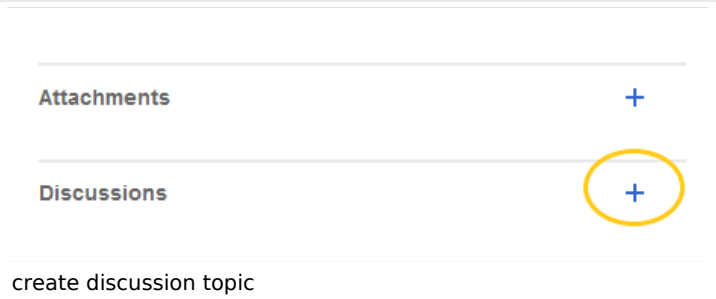


blog teaser text

- **Show entrypoint "Blog":** Shows a link to the page *Special:Blog* in the main navigation.

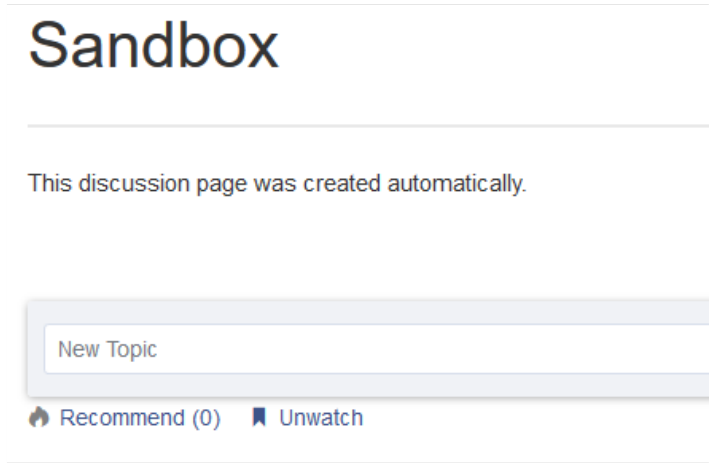
BlueSpiceSocialTopics

- **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

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

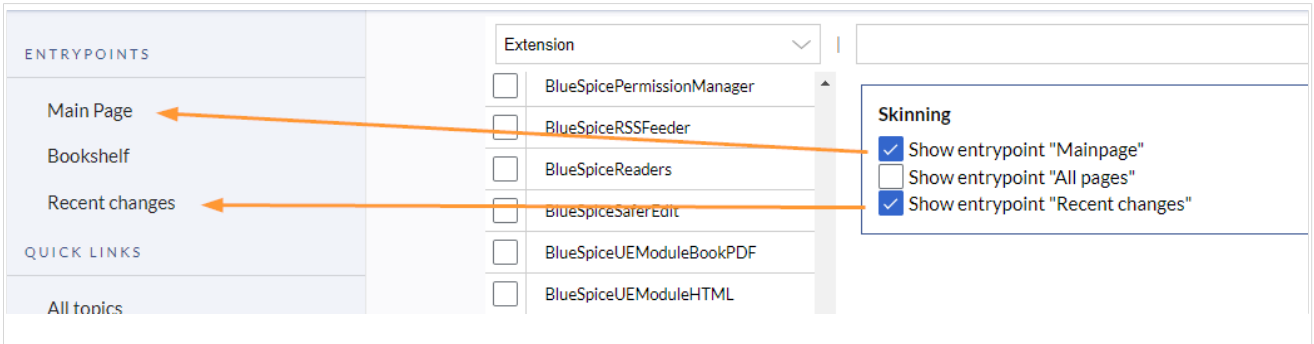


automatically created discussion page

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

BlueSpiceDiscovery

Deactivating the Entrypoint links



Entrypoint links for Discovery skin

Positioning of skin elements

positioning skin elements

- page-sentence: display of page status (Approval status, Expiry)
- categories: display of page categories
- rating: display of page ratings
- recommendations: display of page recommendations

Content Stabilization v4.3+

The following configuration options are available for page approvals:

- **Include handling (1):** Wenn Ressourcen in eine Seite eingebettet sind **und sich diese Ressourcen in Namensräumen mit Freigabe befinden**, können die folgenden Einstellungen ausgewählt werden. Es gibt zwei mögliche Einstellungen:

	Verhalten
Stable versions of included pages	Shows the approved (stable) version of a resource, even if it was approved after the page that includes the resource was approved. (This works only if the resource is located in a namespace with active approval feature).
Versions that were current at the time of approval	Shows the version of the resource which was embedded at the time of the last approval of the wiki page where it is embedded. (This works only if the resource is located in a namespace with active approval feature).

For example, if an approved page contains a template that was modified after the page itself was approved, the page will not show a draft version. Approvals work directly via the embedded resource.

- **Allow viewing of first draft version (2):** If this setting is activated, then all users with read rights can view the first draft. When disabled, only groups from the "Show unstable pages for following groups" setting can see first drafts.
- **Update semantic properties from stable pages only (3):** The property value of the page is read from the stable version of the page and not from the draft version.
- **Entwurfsseiten für folgende Gruppen anzeigen (4):** If the group `user` has been removed from the configuration, users in this group will not be able to see draft versions when they are added as reviewers in a review process. In this case, only users with the roles `sysop` and `reviewer` can access drafts unless other groups are specified. These system groups can only access drafts through the site's version history.

Technical Reference: BlueSpiceConfigManager

Expiry

An article can be marked as "expired" after a certain date and is the ideal basis for an archiving system.

Contents

1 Setting an expiration date 31
2 Unexpiring a page 31
3 List of expired pages 31
4 Archiving obsolete pages 31
5 Expiration log 31
6 Configuration 31

Setting an expiration date

To set the expiration date for an article:

1. **Click** S*et expiry* in the page tools.
2. **Enter** an expiration date. It could be today or any day in the future.
3. **Enter** an expiration comment (optional).
4. **Click** *Save*

When the expiration date is reached, the page shows the expiration marker "expired" in the title area. Additionally a watermark is shown on the article by default.

Unexpiring a page

To remove the expiration marker from an article, click the drop-down arrow next to the "expired"-marker in the title area and unexpire the page.

List of expired pages

To view all pages that have an expiration date, you can go to *Global settings > Tools > Expired pages*. From there, users can remove the expiration marker of any page.

Archiving obsolete pages

Administrators can create an *Archive* namespace if obsolete pages should be archived rather than deleted. Users can then move articles to this namespace.

Expiration log

Administrators can view a log with all expiration activities from the page *Special:Log*.

1. **Select** the log type *Expiry* from the drop-down menu.
2. **Click** Show.

Configuration

You can set the following options in the Config manager.

Additionally, the display of the expiry status can be moved after the page content in the Config manager.

Technical Reference: BlueSpiceExpiry

Namespace manager

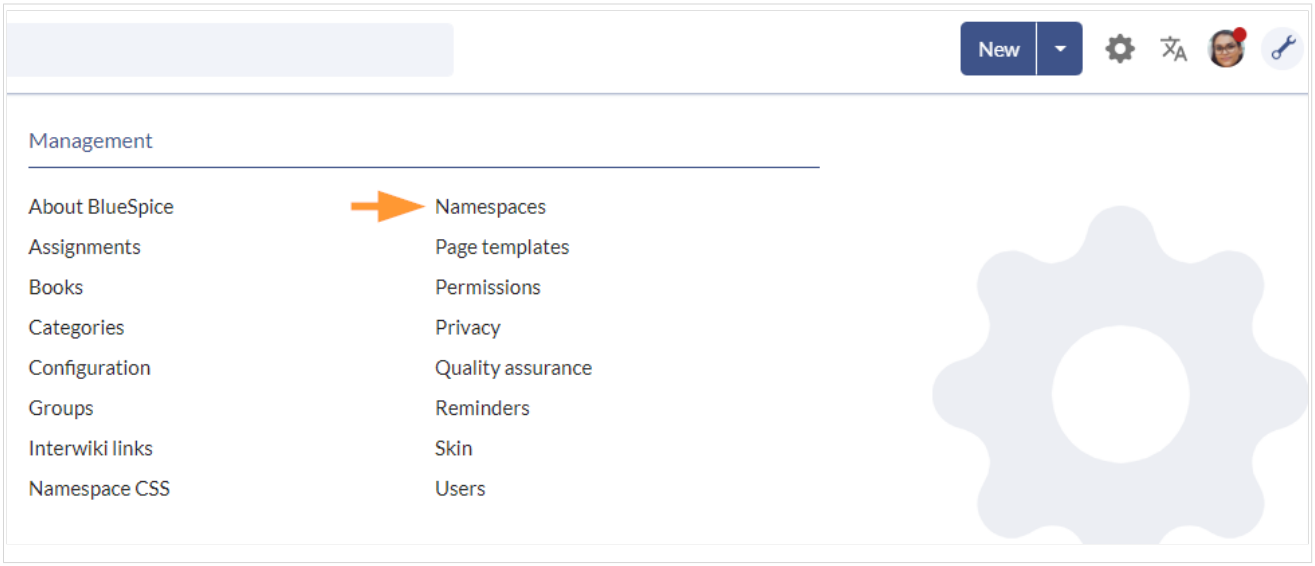
The Namespace manager allows a user with *administrative* rights to create,edit, and delete namespaces and to change the settings of these namespaces.

Contents

1 Where to find the namespace manager 33
2 Creating a namespace 33
3 Editing a namespace 35
4 Deleting a namespace 35
5 Related info 36

Where to find the namespace manager

The navigation link to the Namespace manager is located under *Global actions > Management > Namespaces*. This link opens the page *Special:NamespaceManager.*

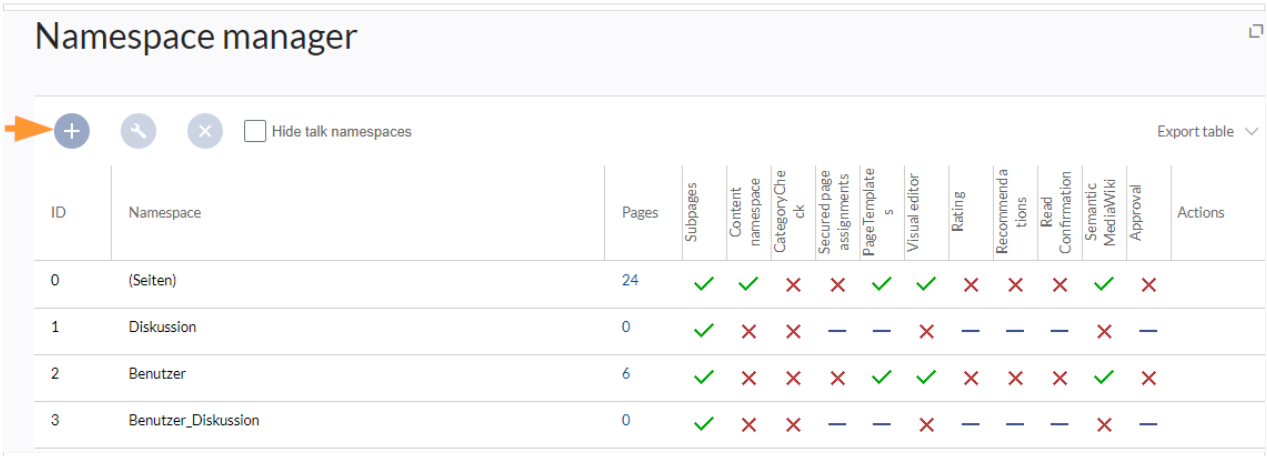


Creating a namespace

Note: If you haven't created namespaces before, familiarize yourself with the concept of namespaces first to understand when it makes sense to set up a namespace. Although it is theoretically possible to create a large number of namespaces, the BlueSpice user interface supports at best a number of 10-30 user-created additional namespaces. If you need more namespaces, consider using several individual wikis or a wiki farm.

To create a namespace:

1. **Click** the "Plus" icon at the top of the page. A dialog opens.



Create a namespace

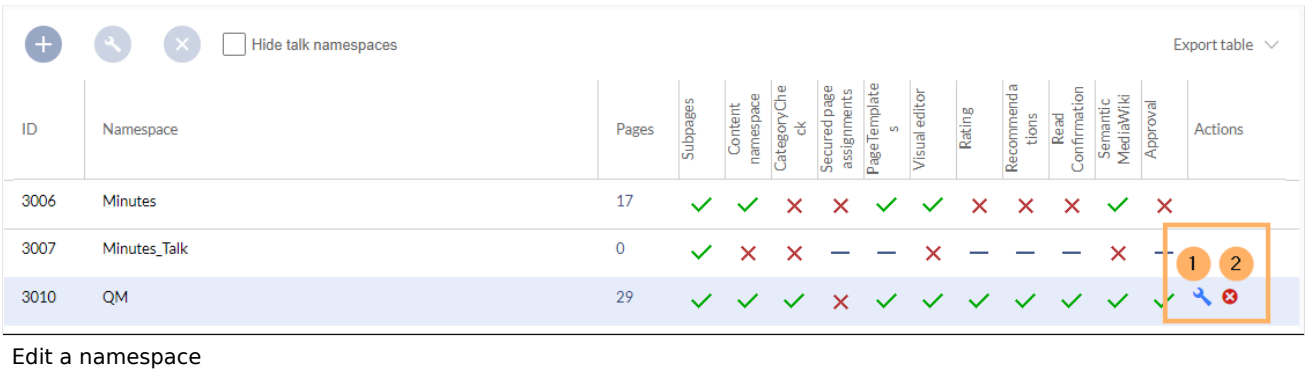
2. **Enter** the name for the new namespace and select the namespace options. Make sure that the name for the namespace is as short as possible, since the name becomes part of the page name of the pages in this namespace. This makes it easier to type in page names, e.g. using search fields in the wiki. Search results and all types of page lists are also displayed more clearly in this way. Examples: QM (for the namespace "Quality Management"), RM (for "Risk Management). Optionally, an alias can also be specified for the namespace. This name can then be used at any time in the wiki instead of the actual name.
3. **Choose** the features you want to activate.
   Usually, the following features are activated: Subpages, Content namespace, PageTemplates, VisualEditor, Semantic MediaWiki.

   Description of the available features:
   - **Subpages:** It is possible to create subpages. If this feature is deactivated the syntax Pagename /withslash does not produce a subpage in the wiki.
   - **Content namespace:** This function determines that a namespace is considered by specific extensions:
     - **Popups:** Popups only appear in content namespaces.
     - **BlueSpiceFoundation:** API for watchlist list is only displayed in content namespaces.
     - **BlueSpiceExtendedSearch:** Content namespaces get a boost and are placed preferentially in the results list.
     - **HitCounters:** Entire function is restricted to content namespaces. Other pages are counted as "0".
     - **ContentTransfer:** Can optionally be restricted to use in content namespaces.
     - **BlueSpiceExtendedStatistics:** Certain namespace selection filters are restricted to this content namespace.
     - **PageForms** (see also:mediawiki.org/wiki/Manual:ContentHandler)
   - **CategoryCheck:** Each time the user saves a page, the save-dialog shows a checkbox to confirm that the users reviewed the categories on the page. This applies to all pages in this namespace and makes sense when a wiki is organized primarily through manual categorization of pages by users.
   - **Secured page assignments:** Only assigned users can edit the page.
   - **PageTemplates**
   - **Visual editor**: Activation of the extension VisualEditor. If this is not activated, the pages can only be edited in source editing mode. If this setting is activated after pages already exist in the namespace, it will take a few minutes for the visual editor to work on the pages.
   - **Rating**: Allows users to rate each page from 1 to 5 stars. An overview page in the wiki shows rated pages sorted by rating.
   - **Recommendations**: Allows users to recommend a page. An overview page in the wiki shows recommended pages by number of recommendations.
   - **Read Confirmation**: Assigned users must mark a checkbox to confirm that they have read the changes to a page.
   - **Semantic MediaWiki**: Activates the link to the page Special:Browse/*<pagename>* in the page tools.
   - **Approval**: New versions of a page are created as drafts. These remain in place until a user with approval rights reviews and approves the page.
4. **Click** *Done*. The namespace is now ready to use.

> **Note:** The corresponding talk namespace for the new namespace is automatically created. This namespace allows users to discuss a page in the wiki on an associated discussions page.

Editing a namespace

A namespace can be edited by clicking on the "wrench"-icon in the table row or above the table when a namespace is selected.



Edit a namespace

When renaming a namespace, all pages in the namespace are automatically renamed as well.

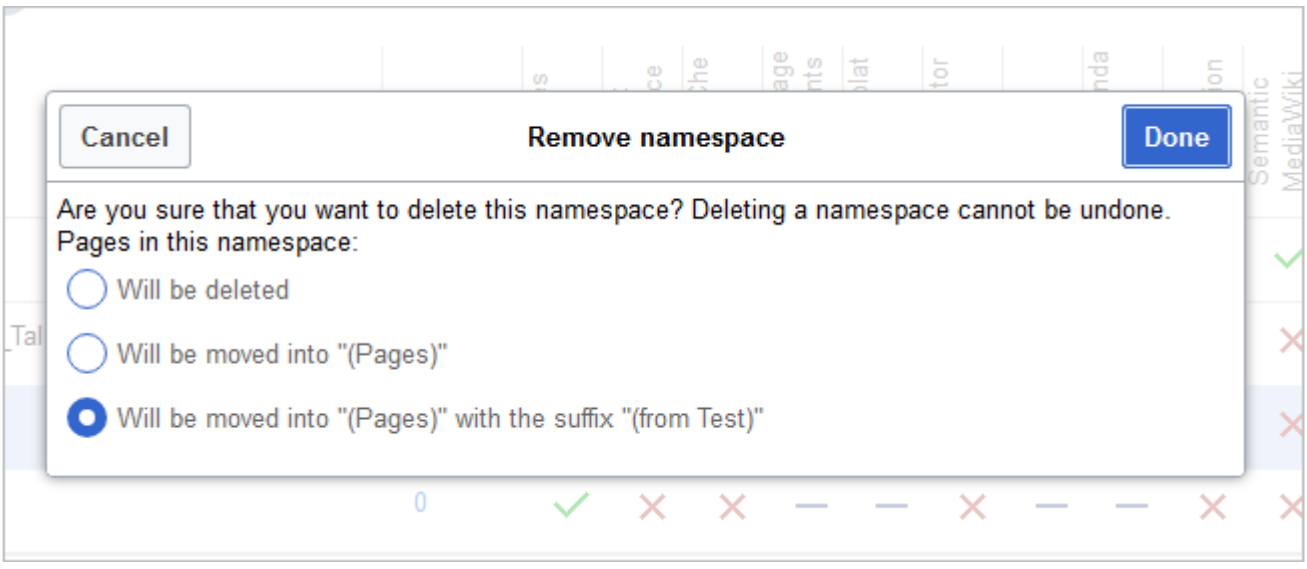
Links to the renamed pages as well as page lists that filter by the original namespace designation are **not** renamed and therefore no longer work.

Discussion namespace names and system namespace names (File, MediaWiki, etc. cannot be changed manually.

Deleting a namespace

Only namespaces created by users can be deleted. The corresponding button (2) is only displayed in such namespaces.

After clicking the delete icon, a dialog box opens.



Deleting a namespace

- *Will be deleted:* deletes the pages in this namespace together with the namespace
- *Will be moved into "(Pages)":* moves the pages of this namespace into the main namespace
- *Will be moved into "(Pages)" with the suffix "(from [namespace name])":* moves and appends the pages with "from [namespace]"

Talk namespaces are deleted with their corresponding namespace and cannot be deleted separately.

Related info

- Reference:BlueSpiceNamespaceManager
- https://www.mediawiki.org/wiki/Help:Namespaces/de
- The concept of namespaces

Technical Reference: BlueSpiceNamespaceManager

Technical Reference: BlueSpiceNamespaceManager

Technical Reference: BlueSpiceNamespaceManager

Page assignments

With the extension **PageAssignments,** users can be assigned to a page. Assigned users can serve as contacts for a page. In addition, assignments can be used to collect read confirmations. If the optional "Secured page assignments" function is activated in a namespace , only assigned users can edit a page.

Contents

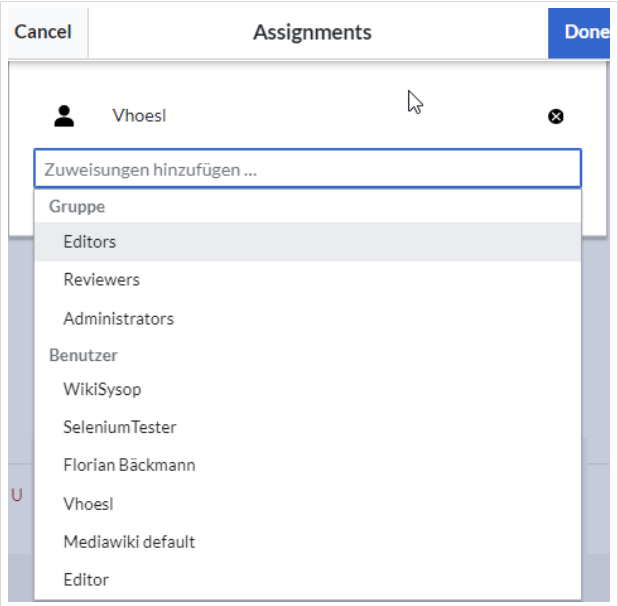
1 Assigning a page 38
2 Assignments management 38
2.1 Possible actions 39
3 Secured page assignments 39
4 My assignments 39
5 Related info 40

Assigning a page

To assign pages to other users, you need the appropriate rights. These are provided via the roles *reviewer, admin* and *maintenanceadmin*. Assigned users need to have the role *editor* to be able to edit the page they are assigned to. Although users with *read* permissions can be assigned to a page, they cannot make changes to the page.

To assign a user or a group to a page:

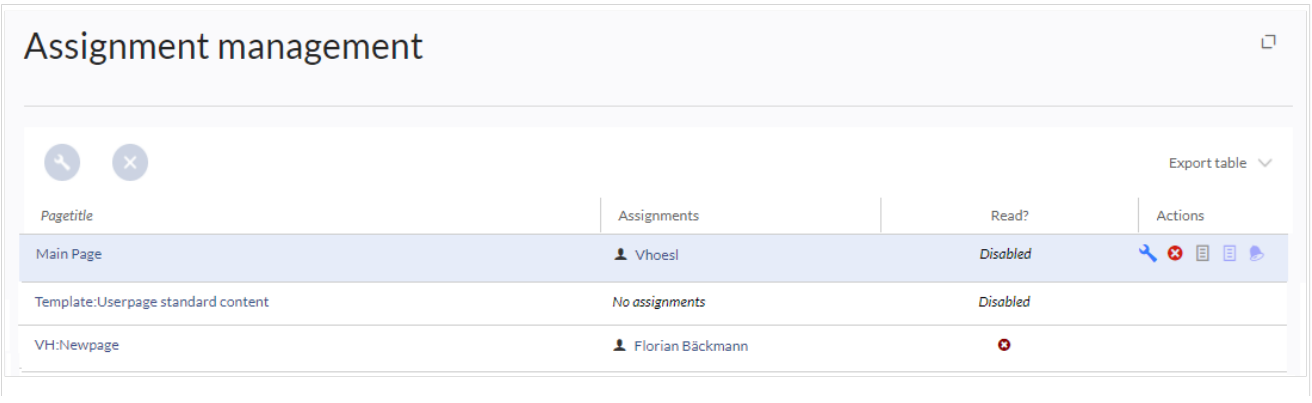
1. **Click** on *Set page assignments* in the page tools.
2. **Type** a user or group name in the assignments text box *Add assignments...*
3. **Click** the *Done* button.
4. **Add** more users or groups (optional).



Assignments dialog window

Assignments management

Users in the *reviewer* role can see a list of all pages that have assignments. This page (*Special: ManagePageAssignments*) can be loaded from the navigation menu under *Global actions >Management > Assignments.*



Assignments manager

Possible actions

For page assignments:

(1) Change assignments (wrench icon)

(2) Delete assignments (delete icon)

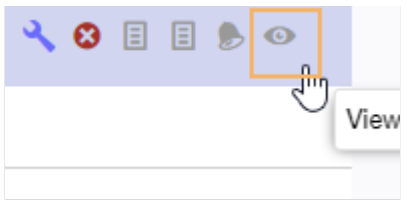
(3) View assignments log (first page icon)

For read confirmations (if activated in the namespace of the page):

(4) Read confirmations log (second page icon)

(5) Request read confirmation (bell icon)

(5) View the read confirmation status for a page (eye-icon)



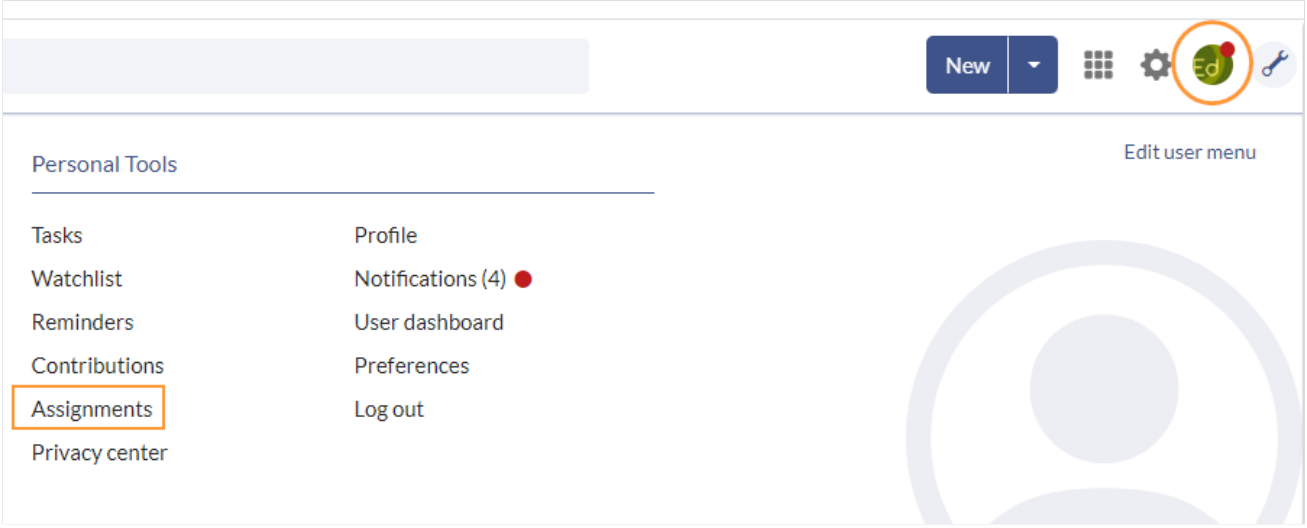
view the read confirmations status for a page

Secured page assignments

In the namespace manager you can configure that page assignments are secured. If a page is created in such a namespace, the page is only editable for users that are assigned to this page. This means that every new page should be created by a user with r*eviewer* or admin *rights*, because only these roles have the necessary rights to make the assignment. If a page is created in this namespace by a user with *edit* rights, this page cannot be edited further by this user, unless he/she is assigned by a user with the necessary permissions.

My assignments

Users can view their own page assignments by clicking on "Assignments" in their personal menu.



My assignments

Related info

- Reference:BlueSpicePageAssignments
- Request read confirmations from assigned users

Technical Reference: BlueSpicePageAssignments

Reminders

The extension **Reminder** allows users to keep track of pages by creating reminders for a particular date. By default, the wiki sends out a notification one week before and on the day that was set in the reminder.

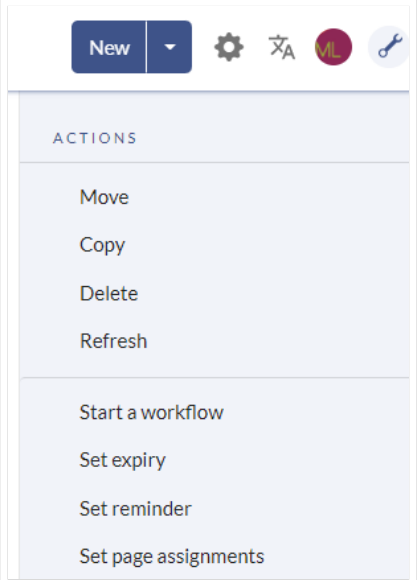
Contents

1 Setting a reminder 42
2 My reminders 43
3 Managing all wiki reminders 43

4 Benachrichtigungen 43

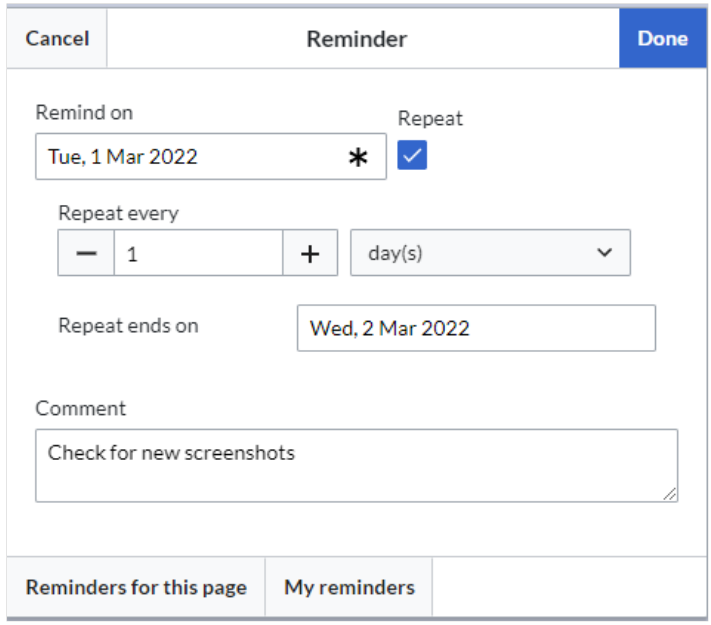
Setting a reminder

To create a reminder, click *Set reminder* in the page tools.



Page tools

A dialog window opens. After entering the reminder data, the reminder is saved after clicking *Done.*

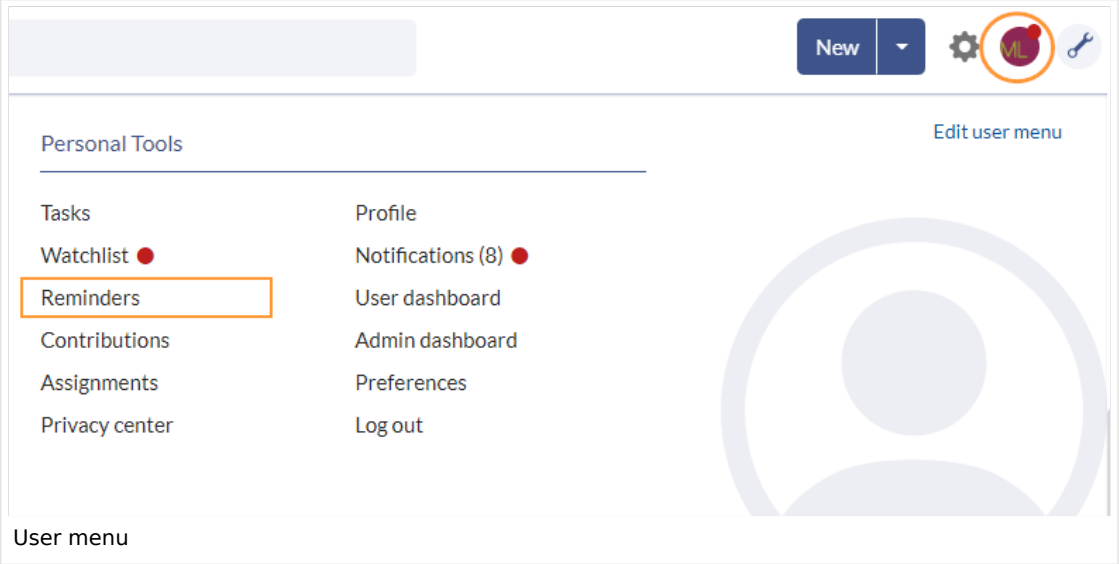


Reminder dialog window

My reminders

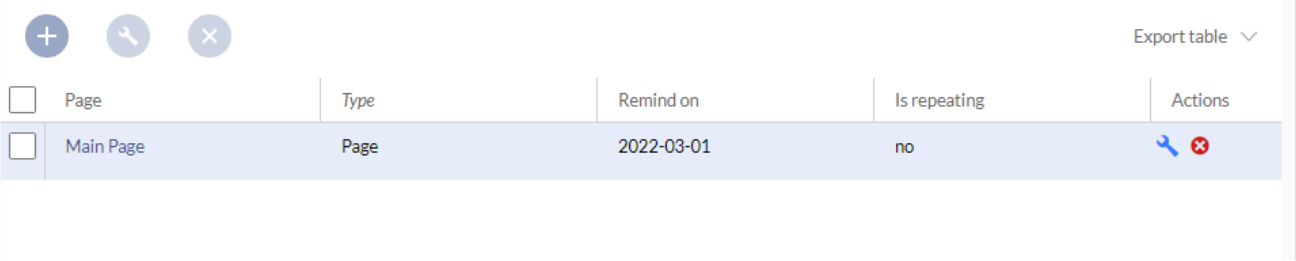
Users can view and manage a list of their own reminders. The list can be loaded in the following ways.

1. In the editing dialog (see image above) via the *My reminders* button.
2. Via the User menu > *Personal Tools* > *Reminders*.



User menu

Here, reminders can be edited (wrench icon) or deleted (x icon).



My reminders

Managing all wiki reminders

The Special:Reminder page is available to wiki administrators. It displays a list of all reminders for all sites and all users. Wiki admins can delete reminders here or edit the due date and other details. Users in the admin role can theoretically create reminders for other users. This ability should be used with caution, however, as users may not expect others to create reminders on their behalf.

Benachrichtigungen

By default, users receive a notification in the wiki and via email a week before or on the due date. This behavior can be disabled in the user preferences.

Technical Reference: BlueSpiceReminder

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.

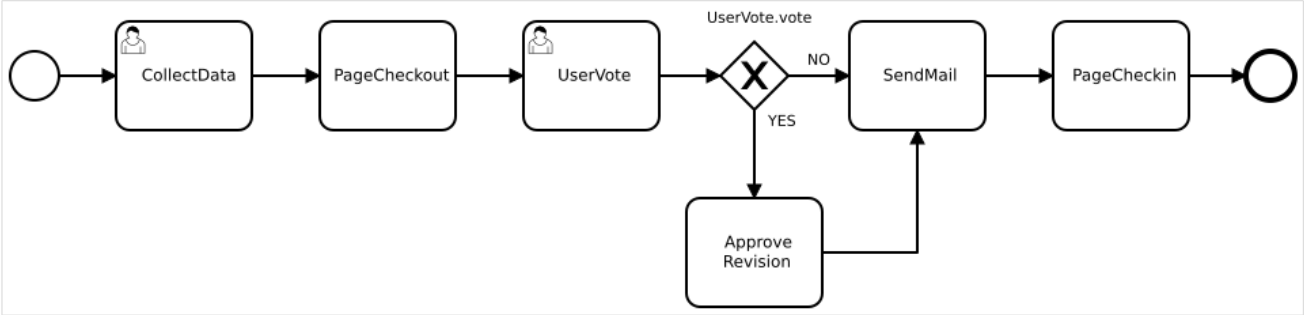
Workflow activities

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.



BPMN diagram of a "Single user approval" workflow

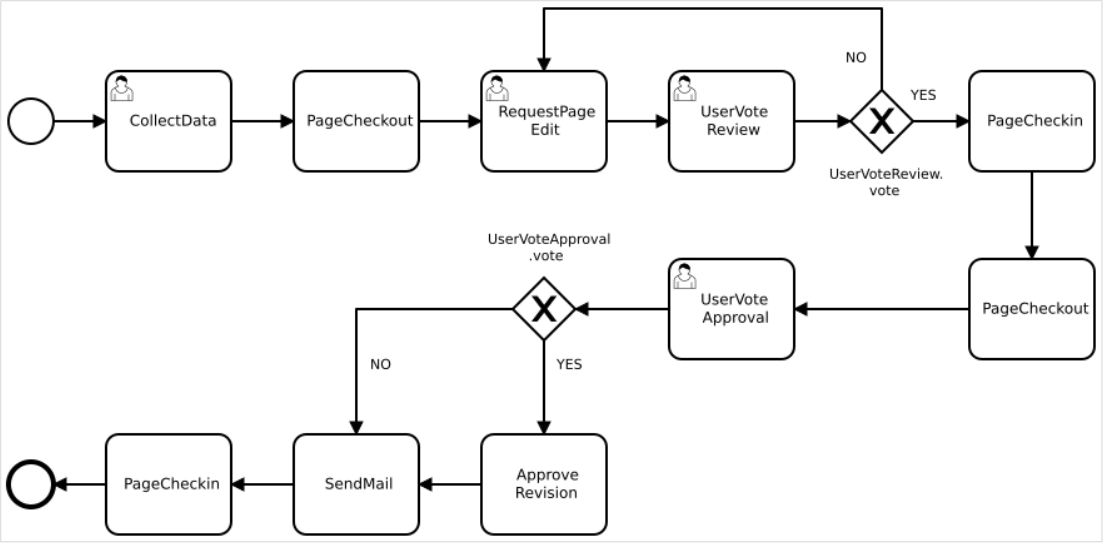
Activity	Description
CollectData	In the first workflow step, the workflow initiator enters the settings: • *User:* ser who is assigned to the task. • *Instructions:* A comment or instructions for the user to understand the task. • *Send report to:* An email report with the results will be sent to this 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. The reviewer also cannot make any edits.
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). The workflow initiator gets an email about the voting result.
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.

View BPMN

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.



BPMN diagram of the "Expert document control" workflow

Activity	Description
CollectData	In the first workflow step, the workflow initiator enters the settings: *User:* User who is assigned to a task. Three different users have to be specified: **Editor**, **Reviewer**, **Approver** *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) can edit the page during checkout. While the **Reviewer** (second participant) of the workflow is reviewing the page, the page stays checked-out to thecan edit the page can edit the page during checkout.checkout. in case the Reviewer requests more edits.
EditPage	The **Editor** user can edit the page and completes the task without comment.
UserVote	After the **Editor** step has been completed, the **Reviewer** user can review the page and submit a vote. Editing by the **Reviewer** is not possible. 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**. The workflow initiator gets an email about the voting result.

Activity	Description
PageCheckin	After the **Reviewer** submits a positive vote (accept), the page is checked in and the workflow continues.
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.

view BPMN

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.

BPMN diagram of the "Group feedback" workflow

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. • S*end 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.
	All users in the assigned group provide feedback via a comment field.

Activity	Description
GroupFeedback	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.

view BPMN

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.

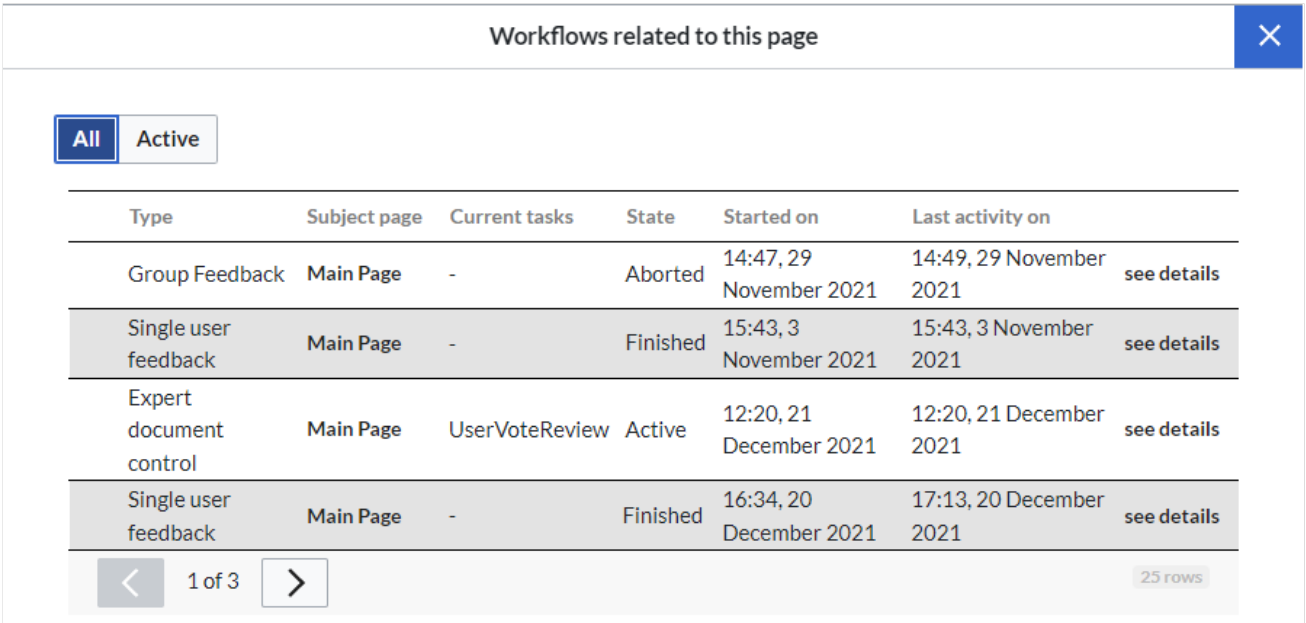
BPMN diagram of the "Single user feedback" workflow

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.

view BPMN

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 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.

Notifications

Events that trigger notifications

There are two types of events that trigger notification

- **generic:** notifications happen for every workflow/activity type
- **activity-specifiy**: activities themselves can decide to send additional notifications

Triggering event	Recipients	Generic	Notes
Task started (task assigned)	All assigned users	Yes	Only triggered for type *UserInteractiveActivity,* i.e., only for activities that have users assigned.
UserVote	Initiator	Yes	The workflow initiator gets an email about the voting result.
Workflow aborted (manual or automatic)	Initiator and all users that were assigned to the current task at time of aborting (not users who were assigned on previous tasks)	Yes	

Triggering event	Recipients	Generic	Notes
Workflow ended (only when naturally ended, not when aborted)	Initiator	Yes	
DueDateClose (2 days before Workflow will expire)	Initiator and all currently assigned users	Yes	
Workflow expired	Initiator and all currently assigned users	Yes	Expiration is just a type of workflow abort, so the same notification as for abort will be sent with the reason explaining that the workflow expired.
Task delegated	User to whom the task was delegated	No	Specific to *UserVote* activity. After delegation, the newly assigned user will be considered assigned and will receive all further notifications that go out to assigned users.

Sending out notifications

- Users can choose whether to subscribe to e-mail notifications in their preferenceds. All users are force-subscribed to web notifications.
- Web notifications are sent out immediatelly after triggering, while email notifications will be sent async, on runJobs.php execution. This applies to notifications in general, not only to workflows

Workflow triggers

Workflows can either be started manually on each wiki page or started only under certain conditions using individual workflow triggers. Triggers also allow to define in which namespaces both manual and automatic workflows are available.

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)

Permissions

The following permissions are used by this extension:

Permission	Included in role	Description
workflows-view	reader	• allows viewing workflow elements, including listing of workflows (e.g., viewing all running workflows on a page • user can view the page *Special:Workflows_overview*
workflows-execute	editor, reviewer, admin	• allows starting a workflow and executing a task
workflows-admin	admin	• allows aborting, restoring and administering all workflows • user fcdan view and edit the page *MediaWiki:WorkflowTriggers*

Example tutorial

You can follow our tutorial for creating a custom workflow that allows users to classify a document and notify a user about the classification.

Technical Reference: Workflows

Technical Reference: Workflows