

Archive:Teamwork



Teamwork - Quality assurance through cooperation!

What is Teamwork?

The quality of the content of articles is very important, especially in a wiki that is frequented by many users. The package **Teamwork** for BlueSpice simplifies the assurance and control of this quality with many functions.

This includes the creation of review processes and the assignment of reviewers, as well as the creation and monitoring of whole workflows. By introducing draft versions and approval mechanisms, you can also control the publishing of new articles and changes without any difficulty.

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Use Cases: Why should I use Teamwork?

If in your organisation...

- Manuals and documentations need to be created in a specified process
- Articles have to be finished on a set date
- Work for the individual employee should be minimized by distributing editing bit by bit
- Quality in your wiki should be enhanced by approvals and fixed contact persons
- Cooperation in your wiki should be done "the professional way"

... then **Teamwork** is perfect for you!

Which extensions are part of Teamwork?

The package **Teamwork** consists of the following extensions:

 **ÜBERSCHRIFT FEHLT**

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How do I use Teamwork? (Step-by-step)

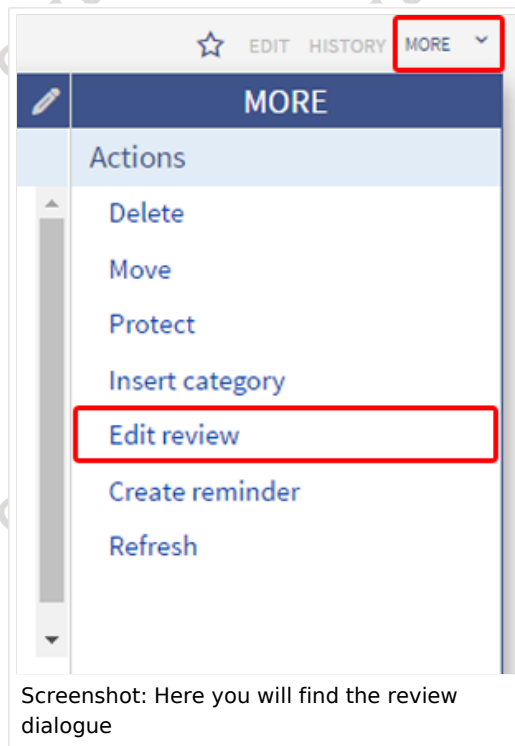
Imagine a typical situation:

You have an important article in your wiki that desperately needs revision. You want to make sure that the content of the article satisfies the quality requirements of your organization, but you're lacking the expert knowledge needed to check for mistakes. That's why you want to commission some colleagues to do this for you. For this, you need a **review process**.

Creating a workflow

Step 1: Call up the article you want to create a review workflow for.

Step 2: Click on *More* on the top right of the article to open the *Widgetbar*. Click on *Edit review*.



Step 3: In the following pop-up window, decide on a *review period* by choosing a start and an end date.

Review

Start date: 04/04/16 End date: 04/11/16

Options: Reviewer can edit the page
 Follow the reviewer order
 Abort review if a reviewer reject it

Template:

Status	Reviewer	Comment	Actions

Screenshot: Decide on a review period.

Step 4: By clicking on the green button you can now add the first reviewer for the article. You can specify the task by adding a comment. Click on *Ok* to fix the reviewer.

Repeat this step to add further reviewers.

By the way: in the column *Actions* you can edit individual reviewers, move them up in the list, or delete them from the workflow completely.

Review

Start date: 04/04/16 End date: 04/11/16

Options: Reviewer can edit the page
 Follow the reviewer order
 Abort review if a reviewer reject it

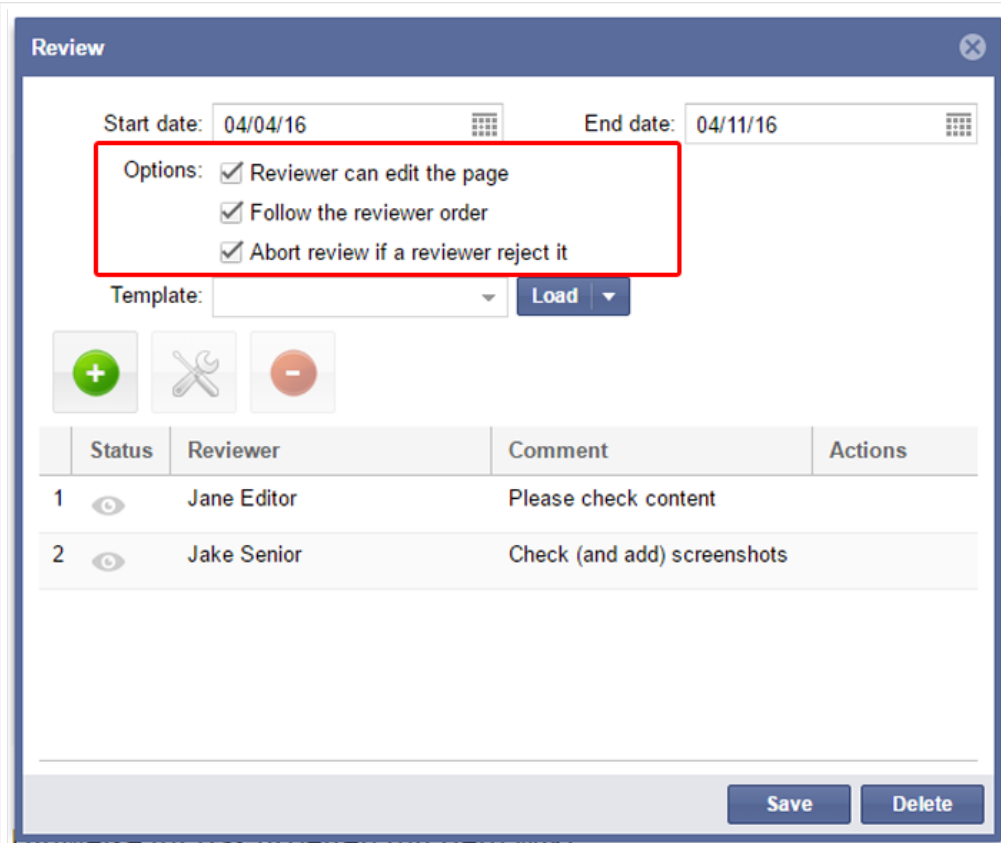
Template:

	Status	Reviewer	Comment	Actions
1		Jane Editor	Please check content	
2		Jake Senior	Check (and add) screenshots	

Screenshot: A newly created reviewer list

Step 5: Decide on additional settings for the workflow:

- Should the reviewers be able to edit the article?
- Is the reviewer order mandatory? If so, then the next reviewer on the list will only be informed of the task when the previous reviewer already checked and approved the article.
- Should the whole review process be aborted if a reviewer rejects the new version of an article? Otherwise the initiator of the workflow will be informed of a rejection and will become the next reviewer. After that, the workflow will begin anew.



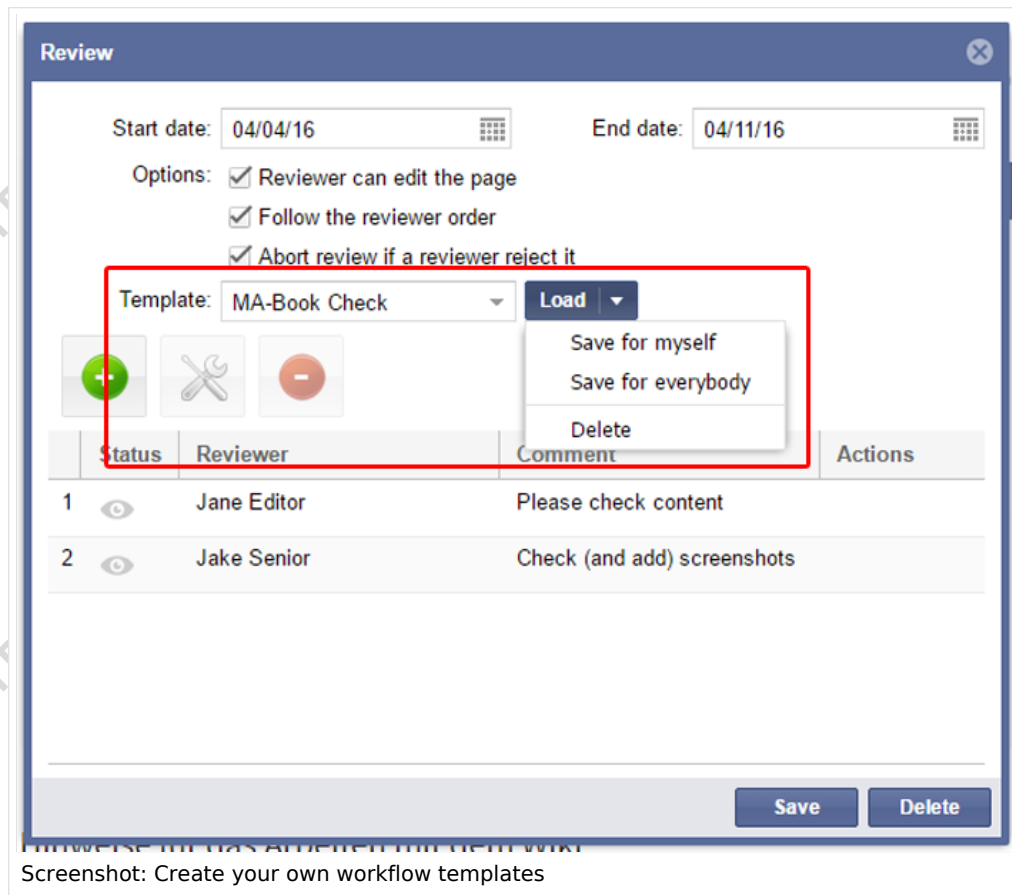
The screenshot shows a 'Review' dialog box with the following elements:

- Start date: 04/04/16
- End date: 04/11/16
- Options (highlighted in red):
 - Reviewer can edit the page
 - Follow the reviewer order
 - Abort review if a reviewer reject it
- Template: [dropdown] [Load]
- Buttons: +, wrench, -
- Table with columns: Status, Reviewer, Comment, Actions
- Buttons: Save, Delete

Status	Reviewer	Comment	Actions
1	Jane Editor	Please check content	
2	Jake Senior	Check (and add) screenshots	

Screenshot: Additional settings

Step 6 (optional): Save the workflow as reusable template. This can save you a lot of time when creating a new workflow, especially when you have a large amount of reviewers, because all settings and reviewers can be transferred to a new review process with one click. Enter any name for your template and click on *Save for myself* if you want to restrict access to the template to yourself, or click on *Save for everybody* if you want to make the template available for all users of the wiki.

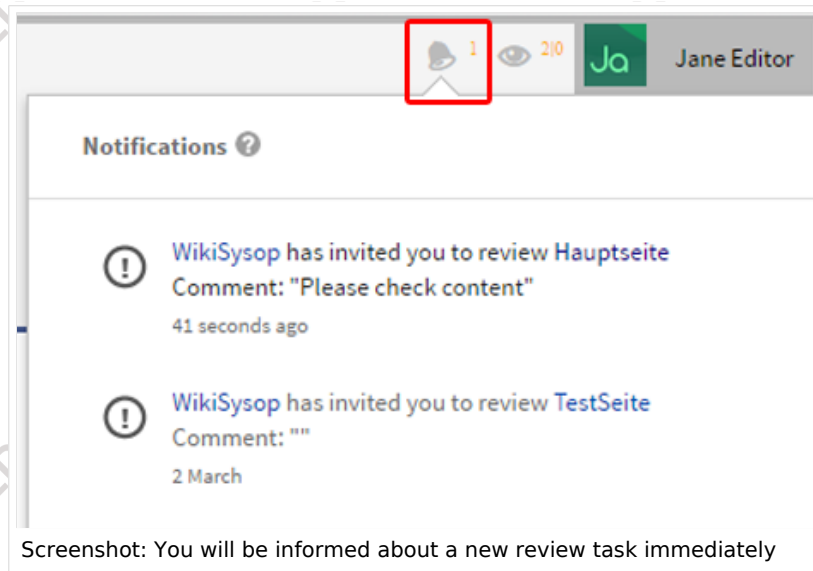


Step 7: Click on *save* to activate the workflow and inform the first reviewer (or all of them at once, depending on your setting in step 5) of the new task.

Reviewing an article

Step 1: If you were added as a reviewer to a workflow, you can be informed about your task in 3 different ways:

- Via Email. You can directly access the article in question by clicking on a link.
- Via notification in the wiki.



c) Via the *Eye* icon that will appear on the page of each reviewer when a review workflow was created. [Here](#) you can learn more about this topic.



Please keep in mind: To receive notifications about upcoming reviews, users need to adapt certain [settings in their user profiles](#). **Step 2:** Call up the article you want to review and check the content. Pay attention to any comments the initiator of the workflow might have added to your task. Depending on the settings in the workflow, you may be able to edit the contents directly, to correct mistakes you notice on the spot. **Step 3:** After finishing the review, open the statebar of the article by clicking on *Review*. Here you will find detailed information about the duration of the review process, as well as the creator of the workflow. You can now agree to the changes in the article, or disagree. It is also very helpful to add a comment, to explain your decision to other users. Optional: If you're not able (for whatever reason) to review an article, you can also delegate the task to another colleague. [Here](#) you can find more on this topic.



Approving an article

If the approval mechanism was activated in your wiki, the article to review might still be a draft or even a first draft, which can not be seen by other users. You can easily see if an article was already approved by looking at its statebar. Here you will find one of three color markings:

Color and description	Meaning
 Freigegeben	Approved articles have been checked and approved by a user with revision rights.

Color and description	Meaning
 Erstentwurf (Freigegeben)	A first draft of an article will only be visible for all users when it was approved by an authorized user.
 Entwurf (Freigegeben)	<p>A draft will be created when an already approved article is edited by a user without revision rights. This draft can not be seen by other users without revision rights; they will see the last approved version instead. If a draft exists, users with relevant rights will see a new tab <i>Draft</i> over the statebar of an article. Here the draft will be shown for approval.</p> <p>Please note: the draft version of an article can be chosen by users as the standard view, so that when calling up a changed article, the draft will be shown instead of the last approved version. The tab <i>Draft</i> will still be available. To use this standard view, the user has to answer the question <i>When to show the stable version of content pages by default</i> (found in the user preferences under the tab <i>Edit review</i>) with <i>Always show the latest version</i>.</p>

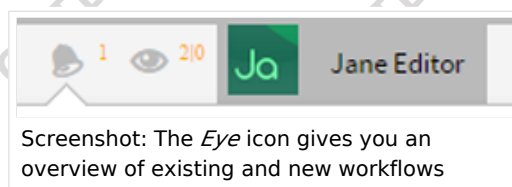
You can approve an article by clicking on the link *Approve* beside the color marking in the statebar.

Please note: articles created or changed by users with the right `autoreview` will be automatically approved on saving.

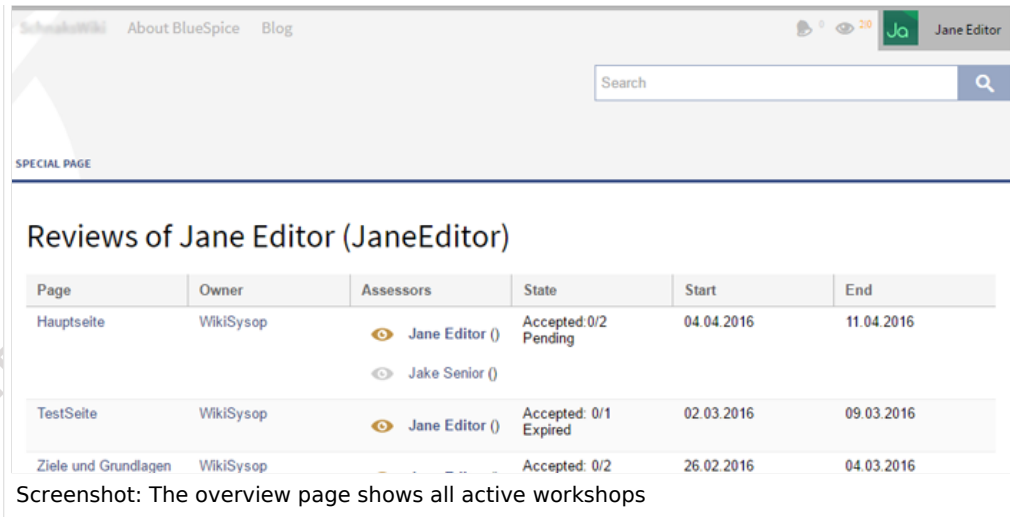
Additional features

View your own reviews

If you were appointed reviewer in a workflow, an eye icon will appear next to your user profile. The numbers beside the icon show on the one hand the number of workflows you are part of (left column), on the other hand the number of workflows you already finished (right column).

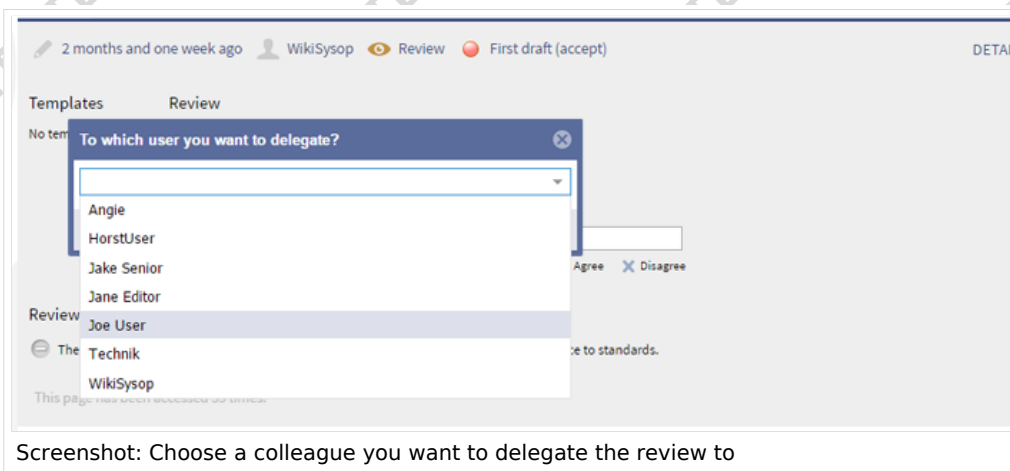


A click on the icon will show you your personal overview page, where all workflows are listed that you are part of.



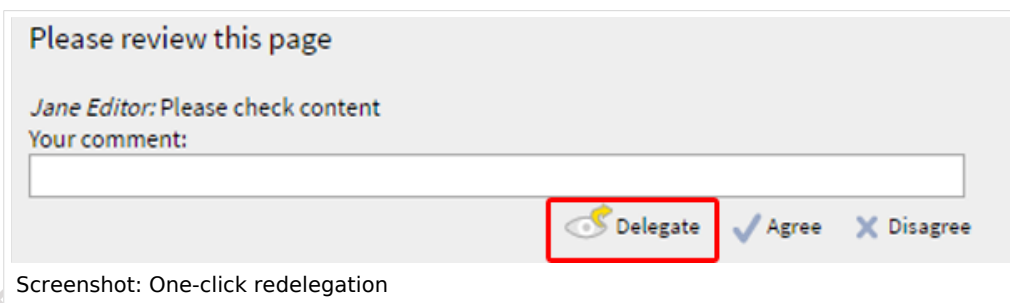
Delegate workflows

You can delegate the review of an article to another user in the statebar.



If a delegation is activated, the delegate and the workflow initiator will be informed via email.

After the delegate reviewed the article like a "normal" reviewer, he can redelegate the workflow via a link in the statebar to the original reviewer.



The reviewer and the initiator of the workflow will be informed via email about this as well.

Monitor progress

After you started a workflow, you will be informed on a regular basis via email about new developments in the review process. The progress and the current status of all existing workflows can be seen on the special page `Special:Review`.

Approval in the version history

The approval of an article is also commented in the version history. This enables you to find out - even after several editings and approvals - which user approved which version when. Just click on the tab *Version History* on the upper right corner of the article. Versions with approval will be marked with *approved by*, followed by the respective user name.

By the way: If the extension **VisualDiff** is also installed in your wiki, approved versions are marked green in the version history.

Screenshot: Approved version marked in color by **VisualDiff**

Special pages

For a better overview and usability, the package **Teamwork** installs the following special pages:

Page	Description
<code>Special:UnreviewedPages</code>	Here you will find all articles that are marked as <i>First Draft</i> and still have to be reviewed and approved.
<code>Special:Pages_with_unreviewed_versions</code>	Here you will find all articles that are marked as <i>Draft</i> . This means that there are several parallel versions of article, which have to be reviewed and approved.
<code>Special:Review</code>	On this page you will find an overview of all active workflows in the wiki.

Page	Description
<code>Special:Review/Pagename</code>	This page will show you the review workflow of the respective page.

Working hints

- Create a flowchart for typical processes within your organization.
- Think about it: which user groups need which rights in your wiki? This has e.g. influence on who will be able to approve articles later on.
- Which content is compulsory? This means that once it is public, it will be binding. This is often the case with organizational handbooks, where it is very important to use approval mechanisms, because a simple review won't be enough. Instead, someone who is responsible for the content of this area should control and approve version changes. Then, once the article is marked as *approved*, it will be an up-to-date and binding version.
- Is there content where free editing is desired? When there is a standard approval process, this could otherwise lower the impetus of users to edit content.
- Do you want to further distinguish between different possibilities to review an article? Should there be e.g. responsible editors for certain parts of the content? In that case it might be worth to take a look at [Responsible Editors](#).
- Remember to set "Review" rights in the [Permission Manager](#) and grant these rights to the respective user groups in the [Group Manager](#).
- If applicable, create first workflow templates, to save time later. This is especially handy when certain users have the same task in the workflow of several articles.
- Remember to advise your reviewers to check the [Email notifications](#) in their user profile.

Administration

Which rights can be granted?

The following rights concern **Teamwork**:

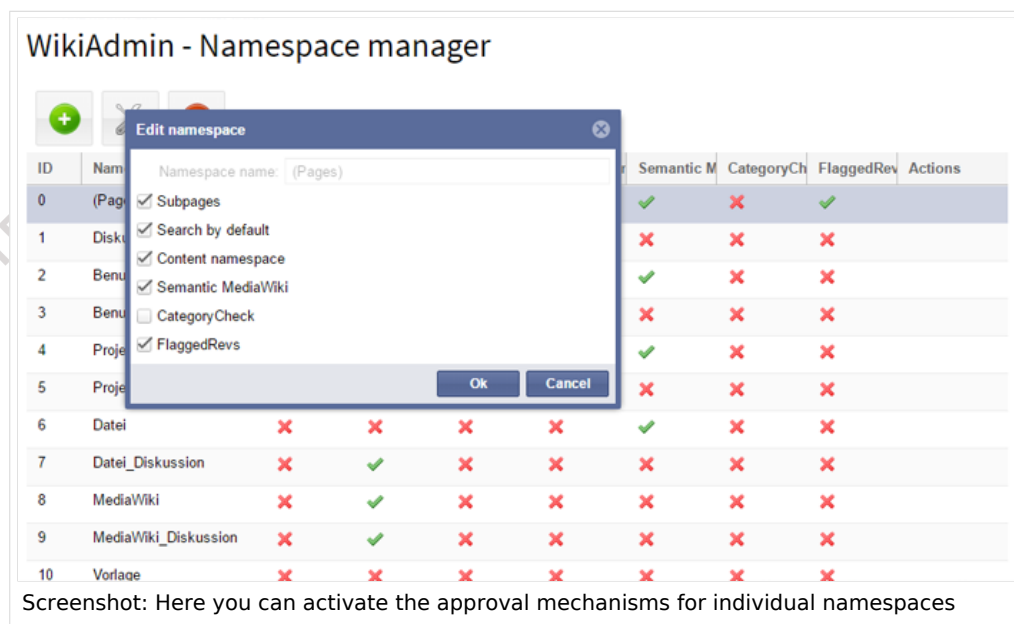
Right	Function
review	The user can view and approve draft versions.
validate	This right is used by BlueSpice in a modified way, but is not relevant for the use of <code>FlaggedRevisions</code> .
autoreview	Changes done by a user will automatically be approved. Please note: in addition to granting this right, the administrator also has to activate the function by checking the entry <i>Enable auto review</i> in the preferences of <i>FlaggedRevsConnector</i> .
	This right is used by BlueSpice in a modified way, but is not relevant

Right	Function
stablesettings	for the use of <code>FlaggedRevisions</code> .
unreviewedpages	The user can see the special page <code>Special:UnreviewedPages</code> .
workflowview	The user can see the workflow of an article; display of the <i>Eye</i> icon
workflowedit	Create, edit, change and delete a workflow
workflowlist	The user can see the workflow overview on <code>Special:Review</code>

Activate `FlaggedRevisions` in namespaces

After the installation of **FlaggedRevisions** the approval mechanism will not be available at once, as it has to be activated first. This activation can be done for each namespace separately, as it is not wise to activate **FlaggedRevisions** in every namespace (there should be e.g. no need to approve discussions).

You can activate the function in the namespace manager in the administration area of your wiki.



You will find that the column *FlaggedRevs* will be deactivated for all namespaces by default. Highlight the namespace you want to activate the approval mechanism for, and click on the edit button. In the pop-up window, check the entry *FlaggedRevs*. Click on *Ok* to activate the function in the namespace.

Additional user groups

The extension **FlaggedRevisions** automatically creates additional user groups that will also be listed in the [Group Manager](#). These groups are so-called system groups and can not be edited.

The following groups are available:

Group	Rights granted	Definition
autoreview	autoreview	Users in this group get the right <code>autoreview</code> , i.e. changes by these users will be automatically approved.
editor	autoreview, review, unreviewedpages	Users in this group get the right <code>autoreview</code> , i.e. changes by these users will be automatically approved. They can also view drafts and see the special page listing the unreviewed pages.
reviewer	autoreview, review, unreviewedpages, validate	Users in this group get the right <code>autoreview</code> , i.e. changes by these users will be automatically approved. They can also view and approve drafts and see the special page listing the unreviewed pages.

You can use these groups and assign users to grant them the respective rights mentioned.

Notifications for reviewers

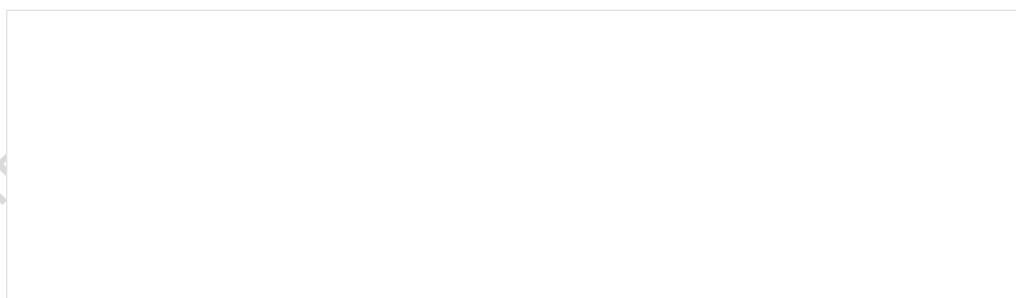
Reviewers will be (if applicable in the order given in the workflow) informed of a new review task, either via email or an wiki-internal notification.

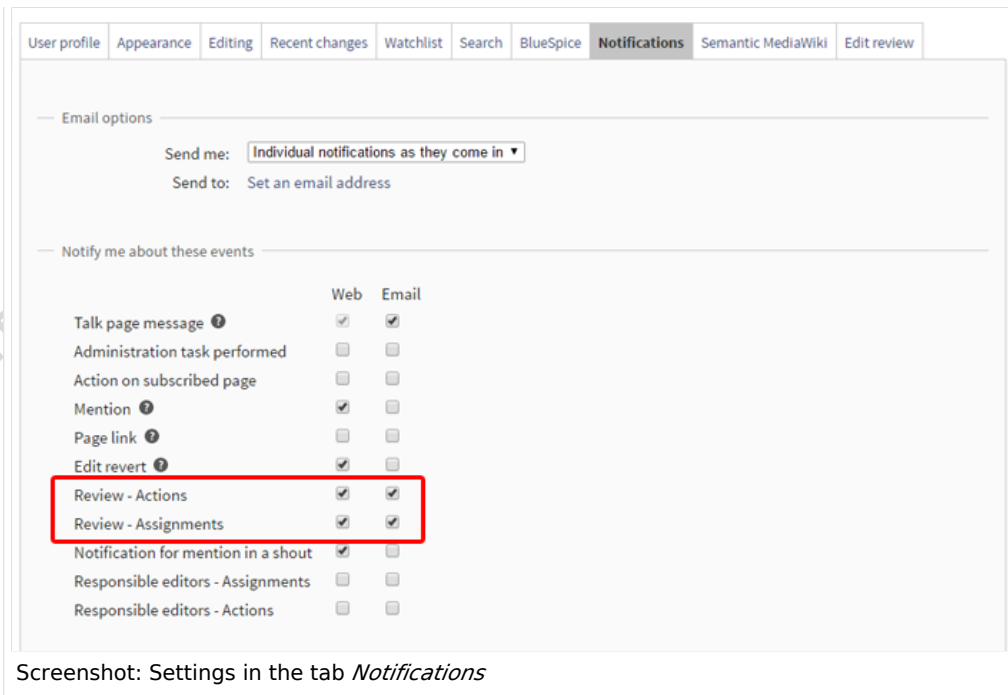
To be able to receive notifications, the following settings must be activated:

- In the tab *BlueSpice*:



- In the tab *Notifications*:



Screenshot: Settings in the tab *Notifications*

Further settings

The package **Teamwork** offers the following settings for administrators:

- In the tab *Review*:
 - **Only the owner of a review can change it**
 - **Notify the owner of a review about changes**
 - **Notify the reviewer of a review about changes**

The type of notification can be configured in the user preferences in the tab *Notifications*:

- In the tab *FlaggedRevsConnector*:
 - **Enable Autoreview**: Uncheck here if you want to deactivate the right `autoreview` in the wiki
 - **Show unstable pages for following groups**: Highlight all user groups here that should be able to see pages that have not been approved yet
 - **Indexing only stable versions**: Check here if you want only approved articles to be indexed
 - **UEModulePDF: Show FlaggedRevs info below main heading**: This concern the release of the article as pdf file. Check here if you want to show in the file that the article is an approved version.

If the package **Bookmaker** is installed in your wiki, you will also find the following settings:

- **Bookshelf: List articles without FlaggedRevs**
- **Bookshelf: List articles without stable revision**
- **Bookshelf: List approved revision log**

Troubleshooting

Problem: There is still a review button, although the corresponding workflow was already deleted.

Solution: Please erase your Browser Cache.

Problem: There is no *FlaggedRevs* column in the namespace manager.

Solution: Move your mouse to any column title shown. Click on the appearing arrow to open a drop-down menu. In the submenu *Columns* you will find an entry for *FlaggedRevs*. Mark it to add the column.

Problem: A review task was given, but the *Eye* symbol doesn't show.

Solution: Please check if the user has the `workflowview` right. To view the list of all given review tasks, the user also needs the right `workflowlist`.

Problem: The right `autoreview` is granted, but the automatic approval doesn't work.

Solution: The function has to be activated by the administrator of the wiki. This can be done in the settings under *FlaggedRevsConnector* by setting a mark with the option *Enable auto review*.

Even more quality assurance with additional extensions

The following extensions are not part of **Teamwork** and are not needed for it to work properly. However, they can support and enhance the functionality:

- **Reminder**, to mark articles as *expired* and bring them to resubmission
- **ResponsibleEditors**, to give individual users direct responsibility for the quality of content for individual articles
- **VisualDiff**, to compare different versions of an article easier and more clearly

The BlueSpice package **Teamwork** is part of [BlueSpice pro](#). It can also be purchased as an extension package in the [Shop](#).