

# Manual:Extension/BlueSpiceReview

A quality version of this page, approved on 24 November 2021, was based off this revision.

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

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### The review page

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

BlueSpice3		Ø• •		SO <sup>22</sup>
Review workflow Here you can give yout vote about the current page content, if you are part of a review wo Review process	urkflow. Furthermore you can change settings and view the recent hist	ory of the running review workflow.	×	<ul> <li>Page information</li> </ul>
Start dete: 01/29/19			(	<ul> <li>Page assignments</li> <li>Reminder</li> <li>Expiry</li> <li>Review</li> </ul>
Status     Reviewer	Comment	Delegated to	Export table $\lor$ Actions	
Options:  Provide Reviewer can edit the page Provide reviewer order Provide Restant review if a reviewer reject it Template: Provide P				4
Recent workflow steps No one has reviewed the page yet.				
The review workflow				

## Starting a review

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

Review workf	low			×
Here you can give y	yout vote about the current page content, if you are part of a review wo	rkflow. Furthermore you can change settings and view the recent histo	ry of the running review workflow.	
Review process				$\bigcirc$
Start date: (	[===]			
End date: (	02/05/19			
Type: F	Flagging V			
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Status	Reviewer	Comment	Delegated to	Actions
1 💿	Testuser		Ş	<b>₹ ⊗ † ‡</b>
Options:	Reviewer can edit the page			
	<ul> <li>Follow the reviewer order</li> </ul>			
	Restart review if a reviewer reject it			
Template:	✓ Load ✓			
Save				
Review se	ttings			



Possible settings:

- **Start date:** The date when the review officially begins. Please note that you cannot schedule a review in advance. The page is locked for editing as soon as the workflow is saved.
- End date: The date on which the review is listed as expired. It has no effect on the review itself and is simply used for managing workflow lists.
- **Type:** The review type determines what will happen to the page once the review has been succesfuly completed. The default type is *Approval* so that it can be used in conjunction with the Approval feature if this feature is activated in a namespace. BlueSpice 3.1 only ships with this one type. BlueSpice 3.2 has a *Default* and an *Approval* option which is explained in the steps to set up a workflow template.
- **Reviewers grid:** A list of all reviewers assigned to review a particular page. Reviewers can be added by clicking on the "Plus" button above the grid and by typing in the name of the user in the dialog that pops up. Existing reviewers can be removed by selecting a reviewer and clicking on the "x" button.

When you set up a new workflow, the following options are available:

- **Reviewer can edit the page:** Everybody that is assigned as reviewer can edit the page while the review is active. Other users cannot edit the page during this time. If this box is not checked, then reviewers will also not be allowed to make changes to the page.
- **Follow the reviewer order:** Reviewers need to cast their votes in sequence. Only when one is finished casting a vote, the next reviewer can start. The order of the reviewers can be adjusted by clicking on up and down arrows that appear when hovering over the reviewer in the grid.
- **Restart review if a reviewer rejects it:** If any of the reviewers rejects the page, the review is restarted and all of the reviewers must cast their votes again.

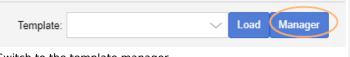
Review workflow Here you can give yout vote about the current page content, if you are part	of a review workflow. Furthermore you can change settings and	view the recent history of the running review workflow.	×
Review process			$\bigcirc$
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1 💿 Testuser		ß	<b>₹</b> 0≯
Options: Reviewer can edit the page Follow the reviewer order			
Restant review if a reviewer reject it      Template:      Save			

To minimize the effort when starting a review, templates are introduced.

#### Managing templates

#### In BlueSpice 3.2

Click Manager next to the template select menu if you are already setting up a review.



Switch to the template manager



Alternatively, you can create a workflow template by going to *Global actions > Management > Review template manager* in the navigation panel of the wiki.

Revie	ew template n	nanager		
Public review	1 2 v templates   Private review templates			
<b><del>+</del></b> 3	3 🗵			Export table $\smallsetminus$
Туре	Name 个	Namespaces	Categories	Actions
default	QA Check ISO9001			<mark>4 ک</mark> 8
default	QA Research and Development	DEV	RE	Edit
flagging	QA Technology			
« <	Page 1 of 1 > > (	2		Displaying 1 - 3 of 3
Managing re	eview templates in BlueSpice 3.2	2		

Create a new template:

- 1. Select if you want to create a template that is available to all users (1) or that is available only to you (2).
- 2. Click the "+"-button (3). This opens the template dialog. Create your template.

Cancel	E	dit review template	Done
Name:	Audit Review		
Туре:	Approval		$\sim$
Namespaces:	$\rm QM~\times$		~
Categories:	Audit $\times$		$\sim$ Å
Options:	Reviewer can edit t	he page	
	<ul> <li>Follow the reviewer</li> </ul>	rorder	
	Restart review if a r	reviewer reject it	
<b>•</b>	<b>S S</b>		Export table $\smallsetminus$
Reviewer		Comment	Actions
1 👤 Florian	Bäckmann		
2 L Renate	Memminger		
3 🤽 Review	ers (reviewer)		

Creating a review template



- 3. Enter a name.
- 4. Select the template type:
  - 1. **Default:** The review is independent of settings in the Config manager. For reviews in **namespaces with approvals**, the page is not automatically approved at the end of the review.
  - 2. **Approval:** The review applies the setting from the Config manager for automatically deleting the workflow after the page has been approved. Pages in namespaces that do not create draft versions are not affected by this setting.
- 5. If the template should only appear on pages in certain namespaces, specify the appropriate namespaces.
- 6. If the template should only appear on pages that are assigned to certain categories, specify the categories.
- 7. Select the review options described above.
- 8. Use the "+"-button to add the reviewers. If you enter a comment here, it will be displayed in the version history. **Note:** A group vote can also be set up for an individual workflow step using the plus button. For this purpose, a wiki group is selected as the reviewer.

Cancel	Edit step Done
Group:	Reviewers (reviewer)
Comment:	Check for ISO9001 criteria
Required approvals:	2 User(s)
Required rejections:	-+ User(s) ──
Group vote	

- 1. Group: The group that will vote on the selected step.
- 2. Comment: Comment that is displayed in the workflow and in the version history for this step.
- 3. *Required approvals:* If this number is reached first, the process step will be completed positively.
- 4. *Required rejections*: If this number is reached first, the process step will be completed negatively.
- 9. Click Done.

The template can now be selected accordingly in a review.

**Note:** The review type can be changed after loading the template and then behaves according to the newly selected type. This means that the "Approval" type from a template can be set to be a "Standard" workflow on a page. In that case, the draft version of the page will not be approved after the workflow has finished.

#### In BlueSpice 3.1

Once the list of reviewers is entered and the other options have been set, enter the name for the template in the input field and click on the arrow next to the "Load" button. Several options are available:

- *Save for myself: T*he template will be shown only to the user who saves it
- Save for everybody: the template will be shown to everybody

Pick the desired option and the template will be saved.



Review workflow Here you can give yout vote about the current page content, if you are part of a review work	kflow. Furthermore you can change settings and view the recent histo	iry of the running review workflow.	×
Review process			$\bigcirc$
Start date         01/29/19         1000000000000000000000000000000000000			
• • •			Export table $\smallsetminus$
Status Reviewer	Comment	Delegated to	Actions
1 💽 Testuser	Testuser: My comment		
Options: Reviewer can edit the page  Follow the reviewer order  Restart review if a reviewer reject it  Template: Test Load Save for myself Save for everybody Delete Delete			
Creating a new template in BlueSpice 3.1			

## Applying a template

Once there are templates saved, users can choose from the list of templates. After clicking the "Load" button, the reviewers that have been saved in this template are added to the reviewer list.

In BlueSpice 3.1, only the list of reviewers is stored in the template.

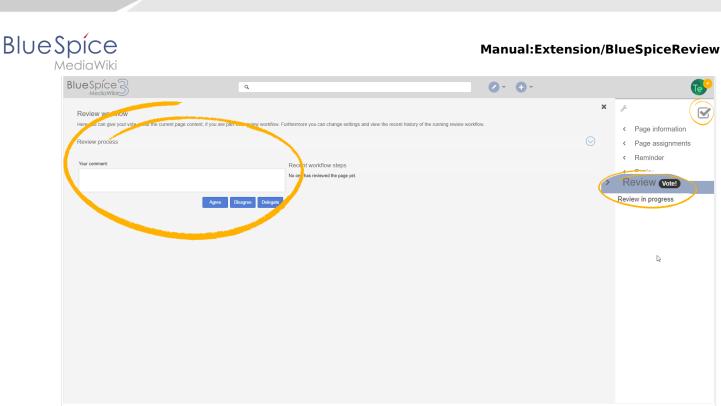
#### **Deleting a template**

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

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

#### Casting votes

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



Voting form

The voting form consists of:

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

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

#### **Rejecting a task**

If a reviewer votes with "Disagree" the workflow returns to the beginning. The next reviewer in line is now the originator of the worfklow. The order of the initial reviewers after the originator is kept the same.

#### **Review overview**

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

# BlueSpice

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≁ ♥ 🖹 🏟 🗏	Special					
Global actions	Review over	rview				
Special pages	Page	Owner	State	Start	End	
<ul> <li>ひpload file</li> <li>☆ Watchlist</li> </ul>	TestPage	Sissy Oppermann	Accepted: 1 / 1 Accepted	29.01.2019	05.02.2019	
Book Manager     Extended statistics	Edit articles	Mary Read	Accepted: 0 / 2 Expired	23.11.2018	20.12.2018	
RSS feeder	QM:Competencies	Sissy Oppermann	Accepted: 1 / 1 Expired	16.07.2018	23.07.2018	
<ul> <li>■ Extended file list</li> <li>☆ Ratings</li> </ul>	QM:Preparing an offer	Sissy Oppermann	Accepted: 0 / 4 Expired	29.08.2016	30.09.2016	
Recommendations						
Reminder						Assessors
Review						SUCS
WikiExplorer     All templates						
Management ^						
Ø About BlueSpice						
🔧 Config Manager						
L Group manager	Page 1	of 1   > >	3		Displaying 1 - 4 of 4	
✤ Interwiki links ■ Namespace CSS Manager						

# Configuration

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

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

## **Related info**

Reference:BlueSpiceReview