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# Maintenance

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# Wiki maintenance made easy

Hopefully, your wiki content grows quickly and your users are busy adding and editing content. The faster your wiki grows, the more it becomes necessary to ensure that both your wiki content and its organization meet the requirements of your wiki audience. After all, the hard work everyone has put into the wiki so far should be reflected adequately. Your users don't want to waste any time when looking for information about a particular topic.

Luckily, the search engine is powerful enough to find the best matches to a user's search term. So even if you are falling a little behind with your wiki maintenance, users should still find their way around the wiki. But you can do a lot to make the user experience even better.

If you are tasked with maintaining the usability and content quality of your wiki, there are several types of tools to help you with this task.

## Permissions

Any user with edit rights can view the special pages that are relevant for wiki maintenance. An exception is the special page *Quality management overview*. This page lists all pages that are in draft or accepted status and requires reviewer rights. This page only has entries if the FlaggedRevs feature is activated for at least one namespace and the user has access to that namespace.

## Content monitoring

The quality management tools make the life of a wiki maintaner much easier. All wiki users can take advantage of the built-in features such as the watchlist, reminders, page assignments and the review workflow, for example. This helps users to take ownership of the wiki content right from the beginning.This works well on a page-by-page level.

As users link, move and delete pages, it becomes necessary, however, to monitor these changes. Over time, some pages might become neglected and add to the outdated content on your wiki.

To keep your content fresh, you should regularly take advantage of the maintance pages of the wiki. The majority of these pages are part of MediaWiki and documented on MediaWiki.org. Use the searchbox on their website to find out more. Some maintance pages are exclusive to BlueSpice, such as WikiExplorer, Assignment management and Quality management overview.

## Accessing the maintenance pages

To view the most important maintenance pages, switch to the *Global actions* navigation. This navigation view contains the two menus *Global actions* and *Management*. Both menus contain useful links to the most common special pages. Click on *Special pages* to access the complete list of maintenance and reports pages:
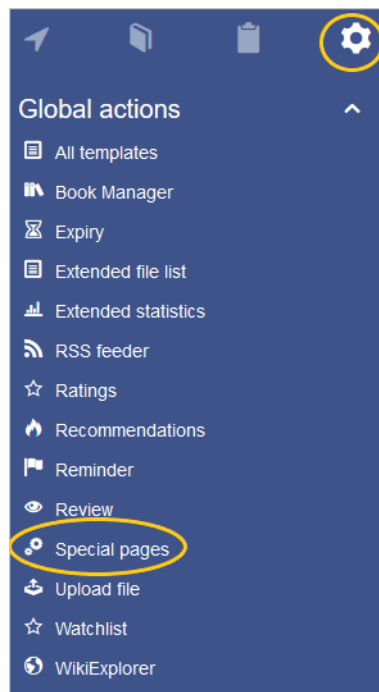
# WikiExplorer

A quality version of this page, approved on *16 September 2020*, was based off this revision.

The extension **WikiExplorer** allows to quickly filter and sort all Wiki pages based on your own filter criteria. WikiExplorer combines the functionality of many maintenance pages. By combining different filters, you can quickly find matching pages.

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## Accessing WikiExplorer

To access Wiki Exporer, go to *Global actions* and select *WikiExplorer.* This opens the special page *Special:WikiExplorer.*

## Choosing the sorting criteria

Sorting criteria and visible columns can be changed by clicking on the arrow icon in the header of any list column.



WikiExplorer

## Sorting sequence

Clicking on the header of any column (not on the arrow) sorts the table based on the values of that column. Changing the sorting order (ascending, descending) can be switched by clicking on the header multiple times.

## Using filters

For some content, there are specially adapted filters available which can be used to sort the list. Filters can be accessed by clicking on the "arrow" icon in the column that should be filtered.

The following columns support filtering:

| Content | Possible filters | Sortable |
|---|---|---|
| Title (Page name) | starts with, ends with, contains, contains not, equals, equals not | **Yes** |
| Namespace | starts with, ends with, contains, contains not, equals, equals not | **Yes** |

| Content | Possible filters | Sortable |
|---|---|---|
| Accesses | less than, greater than, equals | **Yes** |
| Creation date | **None** | **No** |
| Is redirect | **None** | **Yes** |
| Last comment | **None** | **Yes** |
| Last edit date | **None** | **No** |
| Size | less than, greater than, equals | **Yes** |
| Last editor | **None** | **Yes** |
| Categories | **None** | **No** |
| Linked files | **None** | **No** |
| Linked pages | **None** | **No** |
| Links to this page | **None** | **No** |
| Assigned editors | **None** | **Yes** |
| Released | yes, no | **Yes** |
| Release date | less than, greater than, equals | **Yes** |
| New version waits for release | **None** | **Yes** |

## Related info

- Reference:BlueSpiceWikiExplorer

# Page approvals (Acceptance)

The extension **FlaggedRevs** is a MediaWiki extension that activates an approval mechanism. New versions of a page are initially marked as drafts and remain so until a user with *review* rights approves the page.

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# What are page drafts?

In BlueSpice, you can create draft versions of a page. After a page has been edited and saved in draft mode readers of the page will, by default, see the most recently accepted version of the page. This allows editors to work on a draft version until all changes "fit". The changes can then be approved by users with reviewer rights.

By default, all users can see the latest draft version by clicking on the status information of a page or by switching to the version history. It is possible to limit view permissions of drafts to specific user groups.

# Activating the acceptance feature

Activating the acceptance feature is done on the namespace level. A user with admin permissions activates the feature in *Global actions > Management > Namespace manager* for individual namespaces. The dialog window opens after clicking the edit icon (wrench) in the *Actions* column. Select *Approval* and click *Done*.


Activate the Approval feature
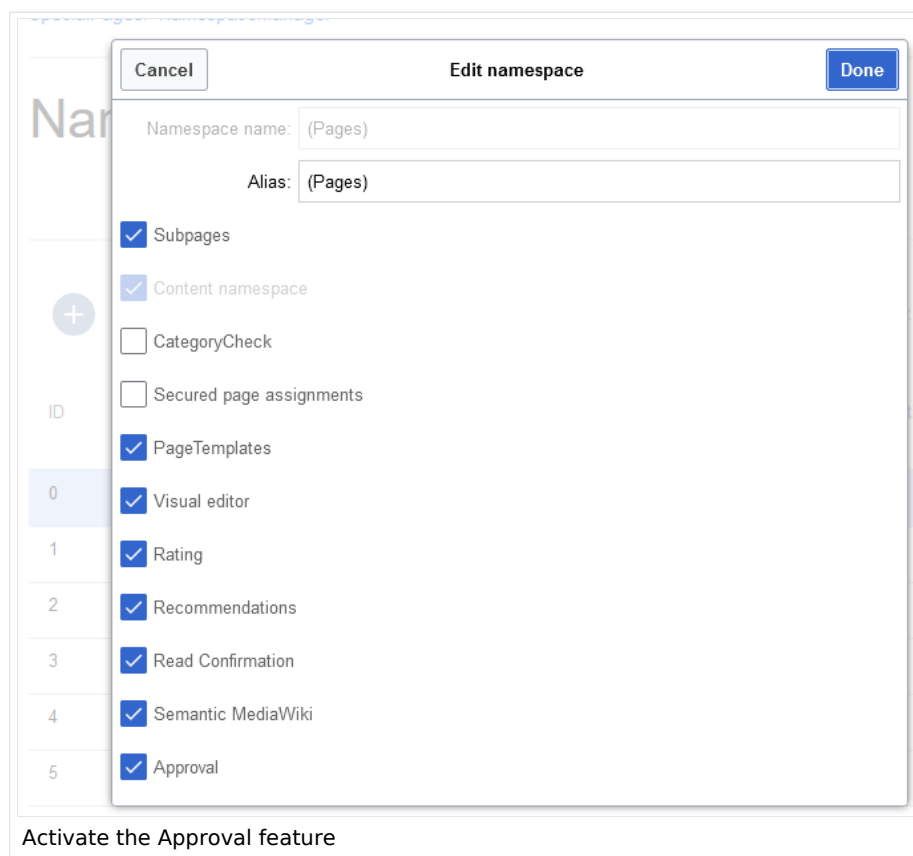
## Existing pages

After activating *Approvals* for a namespace, all pages in the namespace are set into *first draft* mode.

Draft banner notice (1) and page status information in the status bar (2).

Each page in the namespace now displays a banner at the top of the page with the acceptance status (1) and a quick link to publish the page (2).

## New pages

When a new page is created and first saved, it will automatically be visible to all users. Subsequent page edits will be collected in the draft version of the page. If a page is edited and saved multiple times while in draft mode, each edit gets logged in the version history:



Draft revisions

The revisions in draft status have a dotted border and are highlighted in orange. In addition, they are marked as *pending review*. These revisions can be compared before the pending changes of the page are accepted.

## Accepting a page

Users with *review* rights can accept a draft page any time they save a page (*Accept this unreviewed page*):

Accepting pending changes
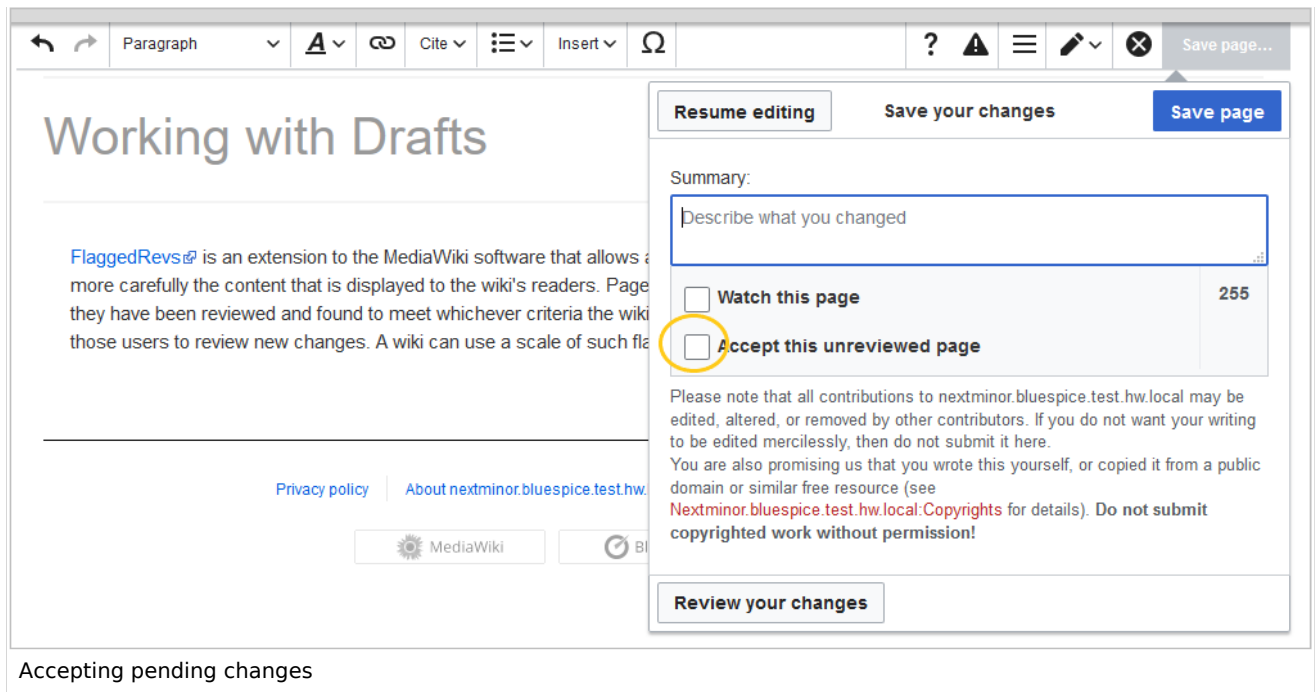
If the page is not accepted at this point, it can be accepted independently from the editing process.

A user with *review* rights can accept the page quickly with the review feature in the title section of the page. The draft message will display an arrow which includes the *accept* function:



Accepting a draft from the title section
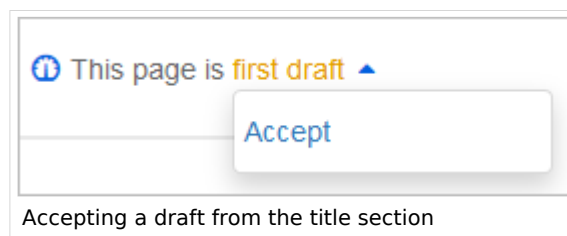
Alternatively, the reviewer can go to the Acceptance page in the Quality Management toolbar instead:



Accepting a draft from the QM-Tools
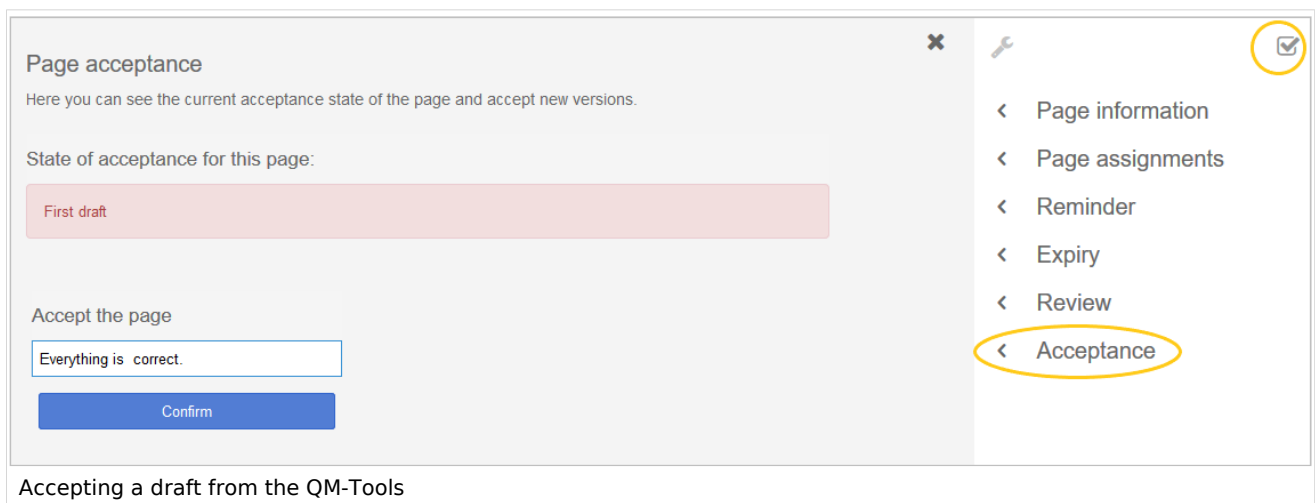
In both cases, the reviewer can leave a comment. This comment will then be shown in the version history of the page.

The page now shows the page version as accepted.



Accepted page

## Setting read permissions for drafts

By default, all users can see the drafts of a page, even readers.

To hide drafts from readers, the group *user* has to be removed from the configuration. An administrator deletes the group user form "Show unstable pages for the following groups" in *Global actions > Management > Config manager*:

**Warning:** 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 and save it:

The two checkboxes *Automatically set the page to stable...* (checkbox is available until version 3.1.) and *Automatically delete the workflow...* determine what happens at the end of a workflow, if there is an active Review for a page. A page can be set to accepted status by a workflow and the workflow can be deleted after the page is marked as stable.

> **Note:** 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 of a page instead.

Anyone with edit permissions will receive a notification that there are pending changes for the page when they access the page in edit mode:



Pending changes notification
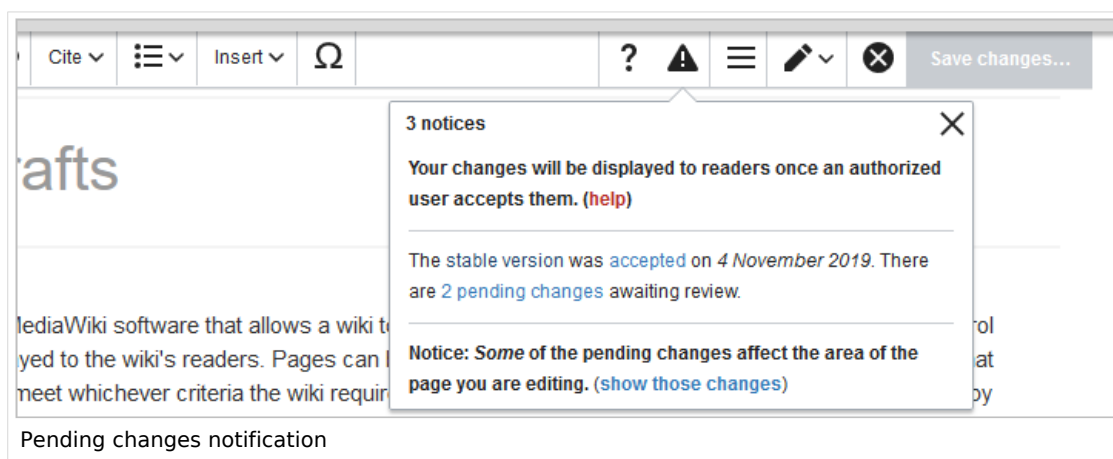
## Changes to embedded templates and files

If a page includes templates or files such as images or PDFs and there is a change to these files after the page has been approved, this will also be reflected in the status banner (1) and the QM status information in the title area (2).



Changes to embedded resources
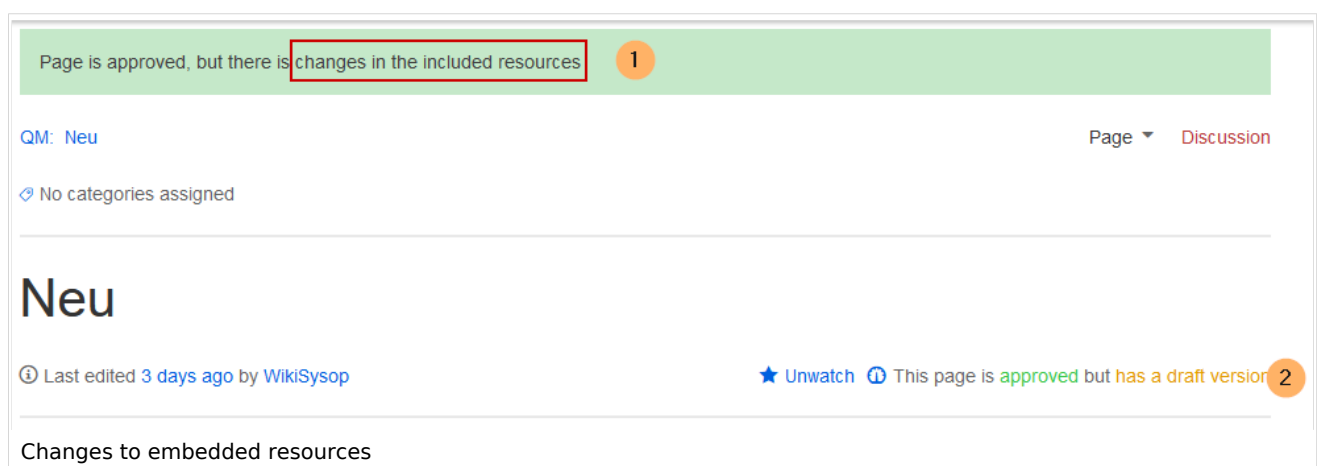
If the embedded resources are located in a namespace without its own approval function, the version of the resource at the time of page approval is displayed in the approved version of the page. The draft version accordingly shows the most current version of the embedded resource. To approve the resource change, the page has to be approved again. This creates a new page version.

## Approving a resource

Before approving the changed resource(s), you should check which resources are affected.

1. **Open** the quality management tools (1). Here you can see under Approval that there are changes to resources (2).
2. **Click** on a changed resource (3) to display the changes between the last two versions of the resource.
3. **Click** "*Review now*" (4) under Unapproved changes. This will take you to the draft version of the page. From there you can approve the page in the title area. **Note:** If there are several changed resources, they can only be approved together.



Approving a ressource

## Settings for resources on approved pages

It is possible via server configuration to show embedded resources (i.e., files, templates or transcluded content) that were changed after the page has been released, in a certain version. The following options exist:

| Setting | Description |
|---|---|
| | Shows the resource version that was valid when the page was approved. |

| Setting | Description |
|---|---|
| FR_INCLUDES_FREEZE | **Warning:** The setting FR_INCLUDES_FREEZE for handling the state of included files of an approved wikipage has no long term support by and should not be introduced in a new wiki for that reason. |
| FR_INCLUDES_STABLE | Always shows the latest approved (stable) version of a resource, even if it was approved after the page was approved (this works only if the resource is located in a namespace with active approval feature). |
| FR_INCLUDES_CURRENT | Always shows the latest version of the included resource. |

**Important!**   Results of a **semantic query**, unlike attribute values **cannot** be "frozen", even if FR_INCLUDES_FREEZE has been set. The query results do not persist in the source text of a page, but are generated dynamically at the time of the query. As a consequence, they are not available for versioning.

## Effects on Semantic MediaWiki properties

Wenn in einem Namensraum gleichzeitig mit der Seitenfreigabe auch Semantic MediaWiki aktiviert ist, sind je nach Freigabestatus der Seite folgende Attribute für SMW-Abfragen verfügbar:

| Document state | Available properties |
|---|---|
| First draft | Current values |
| Approved | Values of the approved (stable) version |
| Draft | Values of the approved (stable) version (default setting) |
| Implicit draft[1] | Values of the approved (stable) version |

The availability of the semantic properties is determined by the following configuration setting:

```
$bsgFlaggedRevsConnectorStabilizeSMWPropertyValues = true;
```

The value for this setting can be set to *false* in the *LocalSettings.php* of the server file system. If set to f*alse,* the property values of the draft version are used for semantic queries instead of the values for the stable version.

# Quality management overview

The Special page *Special:Quality_management_overview* allows users with *admin* or *reviewer* rights to view and filter a list of wiki pages and their review status.



Special page Quality management overview

## Related info

- Quality management tools
- Reference:FlaggedRevs
- Reference:BlueSpiceFlaggedRevsConnector
- Manual:Semantic MediaWiki

1. ↑ An approved page has an implicit draft, if there have been changes to embedded resources (e.g., a template or an image) since the last page approval.

## Manual:Quality management

A quality version of this page, approved on *27 April 2021*, was based off this revision.

### Contents

# The importance of content quality

For many companies, the quality of the information they produce and share is of great importance. At the same time, they want to capture all the knowledge of their employees without creating any unnecessary barriers.



QM tools menu

In BlueSpice, many users can contribute their knowledge. Ideally, anyone can contribute information right away and specialists can then review and approve the content. This ensures that the quality of the content meets the standards of the company. You should always way the benefits and drawbacks of individual quality management features so that you don't create unnecessary roadblocks for users who are eager to contribute.

To access these features, you open the QM tools (with the checkbox icon) in the Page tools panel.

For quality assurance purposes, each content page has the following built-in tools:

- Page information
- Page assignments
- Reminder (BlueSpice pro)
- Expiry (BlueSpice pro)
- Review (BlueSpice pro)
- Acceptance (BlueSpice pro - if FlaggedRevs is activated for the namespace)
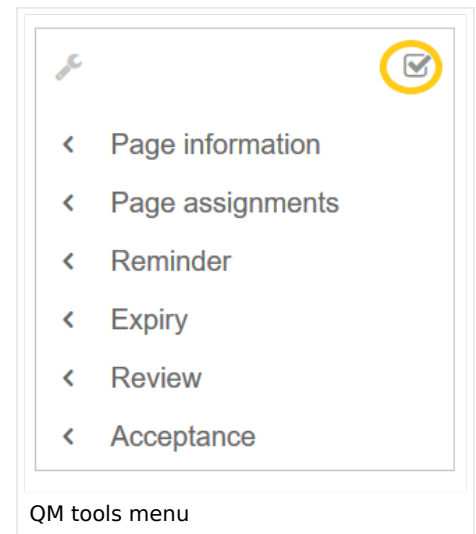
# Page information

The page information gives you some very interesting statistics about the page. Based on this information, you can decide what quality management measures are necessary to improve the page.

The information that is listed on this page is:

- time of last edit and last editor
- number of views
- templates used on this page
- similar pages
- categories
- readers of this page
- authors of this page

# Page assignments

Page assignments are a quick way of giving one or more users informal responsibility and ownership of a page. They are very similar to a watchlist. A user can add a page to their watchlist themselves, but assignments are made by other users.

Page assignments do not change the behavior of the page or grant special rights on a page. For example, the page does not get locked for editing when it is assigned to another user. It is rather a simple mechanism to have users "take a look" at a page. If the feature *Read confirmation* is activated for a namespace, assigned users have to confirm with a checkbox on the page that they have read the page.

## Characteristics

- **Notifications** are sent to assigned users when their page assignment is changed. (This can be deactivated in the user preferences.)
- **Transparency:** Assigned users are listed in the QM tools panel of the page
- **Assignment management:** ( `Special:ManagePageAssignments` )
- **Quick access** from the user profile menu
- **Read confirmation:** page shows a read confirmation checkbox for assigned users (optional)

More about page assignments

## Reminder

A user can create a reminder for a page by selecting a reminder date and by adding an optional comment. Reminders can also be created for other users by administrators and are a quick and informal way of setting due dates for page-related tasks.

## Characteristics

- The user with the reminder receives a notification. (This can be deactivated in the user preferences.)
- Users with reminders are listed on the reminders for the page in the QM tools.
- The page is listed on the Reminders special page under "Global actions" ( `Special:Reminder` ).
- The page is listed on the user's Reminders page, which is easy to access from the user profile menu.

## Expiry

If a page contains content with a known lifecycle, the page can be set to expire on a particular date. On the expiration date, a watermark "Outdated" is added to the page if the corresponding option is set in the ConfigManager. In addition, a reminder can be set so that the user will receive a notification when the page expires. The expiration can be deleted from the page at any time.

## Characteristics

- **Watermark** on page background and in PDF (can be configured)
- **Management list:** *Special:Expiry*
- **Reminder** possible
- **Duration:** Expiry can be removed at any time

# Review

When a more formal review process is necessary, users can create a review workflow. The review workflow has an end date and is the only quality management tool that can lock the page for editing during the review phase. Each user casts a vote whether the page is acceptable or not.

The page is listed on the special page "Review" under "Global actions" ( `Special:Review` ) and on the reviewers' personal Review page.

## Characteristics of the review feature

- **One active review process** per page
- **Types:** Sequential or parallel review
- **Acceptance** or **rejection** by participants
- **Page is locked** for editing (Exception: depending on the configuration, reviewers can get edit rights)
- **Automatic restart** possible
- **Revisions-based:** Entries in the version history
- **Acceptance:** can be combined with the Acceptance feature

# Acceptance

If the pages in a namespace should have a published and a draft version, the setting FlaggedRevs needs to be activated for that namespace. This activates the *Acceptance* feature of the quality management tools.

All changes to a page are collected in a draft version until any user with review rights accepts the page. The pages in this namespace are in draft mode until a user with the right to publish content accepts the page.

There is a global option in the ConfigManager to define which user groups are allowed to read unpublished content. By default, all logged-in users can view drafts.

## Characteristics of the acceptance feature

- **Revisions-based:** First draft, draft, accepted
- **External files:** "Freezes" embedded media and templates
- **Automatic acceptance:** Often the result of a review process
- **Permissions**: Read permissions can (cautiously) be limited

## Permissions overview

This permissions table shows which roles have the necessary right to perform different quality assurance actions. The name of the right that grants a certain permission is shown in parentheses:

| QA action | |
|---|---|
| user (read) | |
| editor | |
| reviewer | |
| admin | |
| maintenance-admin | |
| bot | |
| Can create and manage **page assignments** for any user *(pageassignments)* | |
| | |
| x | |
| x | |
| x | |
| | |
| Can **be assigned** to a page *(pageassigneable)* | |
| x | |
| | |
| | |
| | |
| Can create and | |

| | |
|---|---|
| manage **reminders** for any user *(remindereditall)* | |
| | |
| | |
| x | |
| x | |
| Can create and manage their own **reminders** *(read)* | |
| x | |
| | |
| | |
| | |
| Can set and manage page **expiration** dates *(expirearticle)* | |
| | |
| x | |
| | |
| x | |
| x | |
| Can create and manage **review workflows** *(workflowedit)* | |
| | |
| x | |
| x | |
| x | |

| |
|---|
| x |
| Can be assigned to a **review workflow** *(read)* |
| x |
| |
| |
| |
| |
| Can view the **review workflow** on the page *(workflowview)* |
| x |
| x |
| x |
| x |
| x |
| Can view the complete **list of reviews** *(workflowlist)* |
| x |
| x |
| x |
| x |
| Can **approve** a page *(review)* |
| |

| | |
|---|---|
| x | |
| x | |
| x | |
| Own changes are **automatically approved** changes *(autoreview)* | |
| | |
| | |
| | |
| x | |
| x | |
| Rollbacks are **automatically approved** *(autoreviewrestore)* | |
| | |
| | |
| | |
| x | |
| x | |

# Related info

- [Working with drafts (Flagged revisions)](#)
- [The review workflow](#)