

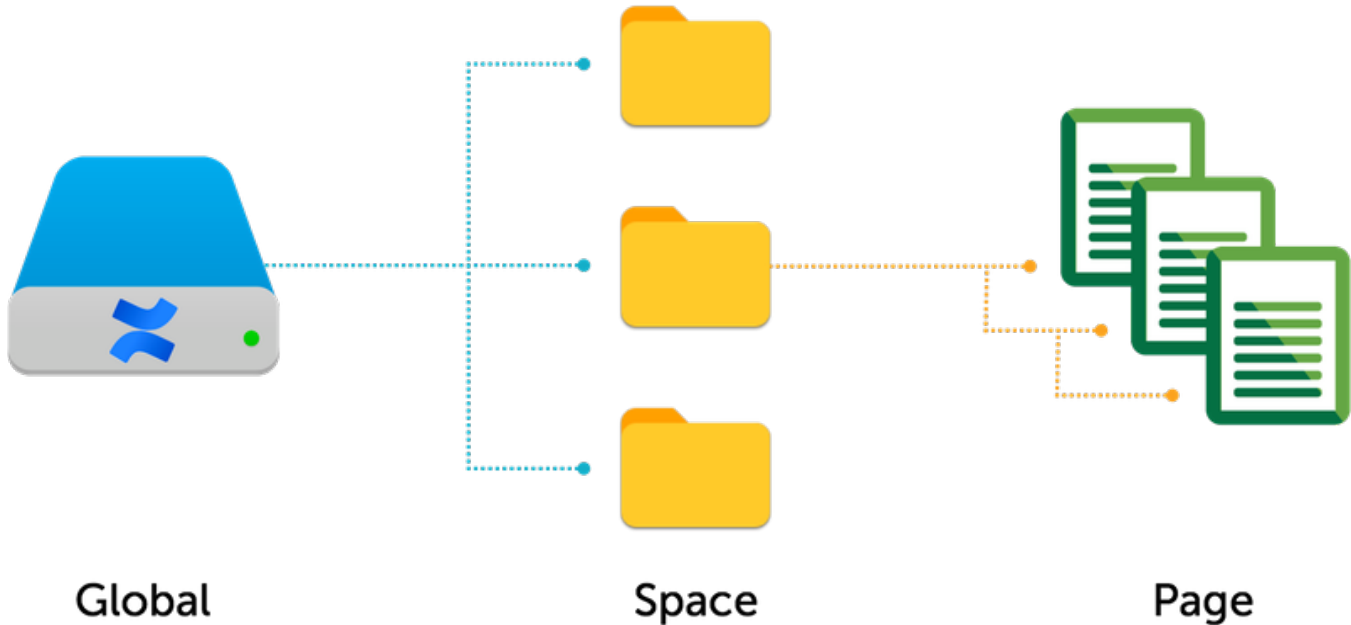
# Roles and Permissions

## Overview

In addition to the standard Confluence roles and permissions, the Comala Workflows app adds some of its own.

## Confluence hierarchy

The roles and permissions for both Confluence and Workflows are based on the topology of Confluence itself.



*Note: "Page" means pages and blog posts.*

Workflows, roles and permissions exist at all three levels of the hierarchy.

## Confluence Permissions

For an overview of Confluence permissions, see: [Permissions and Restrictions](#) (Atlassian)

The following [Action](#) macros can be used to change page-level restrictions as a response to workflow [Events](#):

- [add-restriction macro](#) — Add content view/edit permissions
- [remove-restriction macro](#) — Remove content view/edit permissions
- [set-restrictions macro](#) — Reset content view/edit restrictions

## Confluence roles

These are the standard roles in Confluence, and how they relate to the Comala Workflows app.

Role	Notes
<b>Anonymous</b>	Anyone who is not logged in to Confluence.  Note: Notifications resulting from state or task expiry events will often be attributed to this user. For more information, see: <a href="#">Expiry Dates</a> .
<b>User</b>	Must be logged in to Confluence.

<b>Space Admin</b>	<p>Responsible for setting <a href="#">Space permissions</a> for content access, editing and deletion.</p> <p>Responsible for selecting which <a href="#">workflows are available</a> in the Space, and whether the space runs in <a href="#">Page Mode</a> or <a href="#">Space Mode</a>.</p> <p>Responsible for Space-level <a href="#">configuration</a> and <a href="#">notification settings</a>.</p>
<b>Confluence Admin</b>	<p>Responsible for <a href="#">Global workflows</a>, <a href="#">configuration</a> and default <a href="#">notification settings</a>.</p> <p>Can <a href="#">set restrictions</a> on which Spaces can use <a href="#">Page Mode</a> and/or <a href="#">Space Mode</a>.</p>
<b>System Admin</b>	<p>Responsible for <a href="#">installing</a> and <a href="#">upgrading</a> Comala Workflows app at Global level.</p>

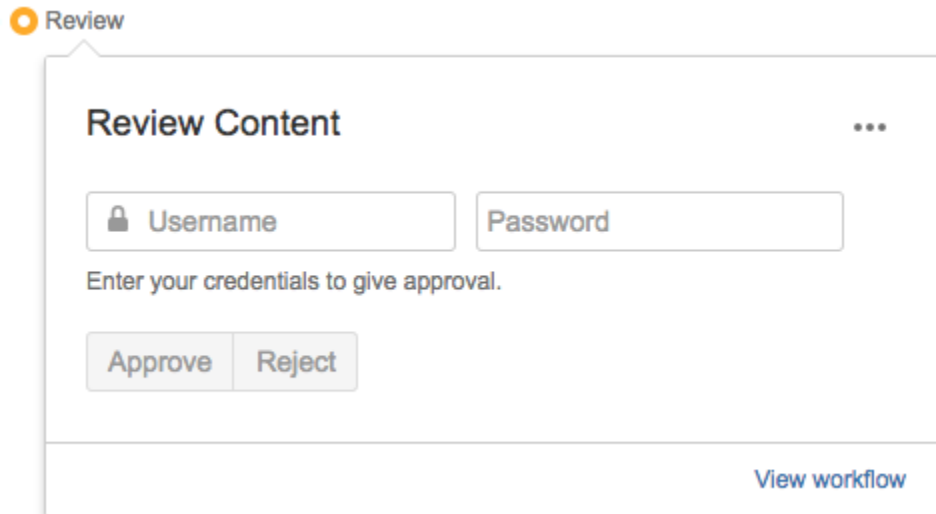
## Workflow Permissions

These are the permissions from the perspective of the Comala Workflows app:

Permission	Notes
<b>View Content</b>	<p>Users who can <b>view the content</b></p> <p>This requires <i>all</i> of the following Confluence permissions:</p> <ul style="list-style-type: none"> <li>• <b>"Can use"</b> – Global permission</li> <li>• <b>"View"</b> – Space permission</li> <li>• <b>"View"</b> – Page (or blog post) permission, or no page-level restrictions</li> </ul> <p>Users who only have this permission are sometimes referred to as "Viewers", "View-only users" or "Read-only users".</p>
<b>Edit Content</b>	<p>Users who can <b>edit the content</b> (including Admins)</p> <p>This requires <i>all</i> of the following Confluence permissions:</p> <ul style="list-style-type: none"> <li>• <i>The permissions listed for "View" above</i></li> <li>• <b>"Add"</b> – Space permission</li> <li>• <b>"Edit"</b> – Page (or blog post) permission, or no page-level restrictions</li> </ul>
<b>Workflow Admin</b>	<p>Users who can <b>administer the workflow at content level</b></p> <p>This requires <i>any</i> of the following Confluence permissions:</p> <ul style="list-style-type: none"> <li>• <a href="#">System Admin</a></li> <li>• <a href="#">Confluence Admin</a></li> <li>• <a href="#">Space Admin</a></li> </ul> <p>You can define additional Workflow Admins, even if they don't have any of the three Admin permissions listed above, by adding users to the <code>adminusers</code> property of a <code>{workflow}</code> macro – this grants the listed users the Workflow Admin permission for that particular workflow, and all content it is applied to.</p>

## Credentials verification

Users participating in reviews can optionally be required to authenticate their identify with a credentials check.



For more information, see [Credentials prompt](#) and [Reviewer Authentication](#).

## Workflow roles

Workflow roles relate to interactions with the content and the workflow applied to it:

Role	Notes
<b>Viewer</b>	Consumer of content Must have <b>View Content</b> permission
<b>Author</b>	Responsible for producing (creating, editing) content Must have <b>Edit Content</b> permission
<b>Assignee</b>	A user who is <a href="#">assigned as a content reviewer</a> or <a href="#">assigned to a workflow task</a> Assignment is optional by default, but can be required or prevented in the workflow markup or app configuration. See: <a href="#">Assignment Examples</a> , <code>{approval}</code> macro, <code>{task}</code> macro.
<b>Reviewer</b>	Responsible for reviewing content – see <a href="#">Reviews</a> (concept) and <a href="#">Content reviews</a> (user guide) Must have <b>Edit Content</b> permission Reviewers can optionally be required to authenticate their identity prior to making a review. For more information, see <a href="#">Reviewer Authentication</a> .
<b>Approver / Rejector</b>	A <b>Reviewer</b> who has either approved or rejected content during a content review. These can be used in some of the <a href="#">Developer APIs</a> , and also accessed via the <a href="#">Workflow Supplier</a> or <a href="#">Value References</a> . In some elements of the user interface and macros, the term "Approver" is used to refer to a "Reviewer" or "Assignee".
<b>Producer</b>	Collective term for Authors, Assignees and Reviewers. Namely, all users who have <b>Edit Content</b> permission.
<b>Workflow Admin</b>	Can force workflows in to a specific state on a page-by-page basis – see: <a href="#">Administrator state override</a> . Can remove <code>stickylabels</code> – see <code>{workflow}</code> macro. Must have <b>Workflow Admin</b> permission In <a href="#">Space Mode</a> , <b>Confluence Admins</b> and <b>Space Admins</b> can use the <a href="#">Initialize States</a> feature to bulk transition all content for a given workflow in to a given state.

## Page Mode

When a Space is running in [Page Mode](#), users with **Edit Content** permission will be able to access the following additional features via the [Page Tools Menu](#):

- [Add Workflow - Page Tools](#)
- [Edit Workflow - Page Tools](#)

## App configuration

Setting	Where	Notes
<b>Workflow Activity and Drafts Visibility</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Global</a></li> <li>• <a href="#">Configuration - Space Tools</a></li> </ul>	<p>Can users who only have <b>View Content</b> permission (but not Edit or Admin) see <a href="#">draft content</a> and <a href="#">Activity Report - Content</a>?</p> <p>Default: Only</p>
<b>Tasks Mode</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Global</a></li> <li>• <a href="#">Configuration - Space Tools</a></li> </ul>	Can users other than task creator and assignee complete or assign tasks?
<b>Space Workflows</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Global</a></li> </ul>	Which spaces, and thus Space Admins, can use <a href="#">Space Mode</a> ?
<b>Page Workflows</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Global</a></li> </ul>	Which spaces, and thus Space Admins, can use <a href="#">Page Mode</a> ?
<b>Workflow Importer Group</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Global</a></li> </ul>	<p>Which Confluence Admins and Space Admins can import workflows from the <a href="#">Workflows Exchange</a>?</p> <p>Affects: <a href="#">Import - Global</a>, <a href="#">Import - Space Tools</a>.</p>
<b>Email Any Address</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Global</a></li> </ul>	Can email addresses which are not associated with <b>Users</b> be used in the <code>{send-email}</code> macro?
<b>Default View</b>	<ul style="list-style-type: none"> <li>• <a href="#">Configuration - Space Tools</a></li> </ul>	When using <a href="#">Same-space publishing</a> , should users with <b>Edit Content</b> permission see the draft or published version of content by default?

## Testing roles and permissions

Whilst developing and testing workflows, it is useful to view the content from the perspective of another user – such as a Viewer, or a Reviewer – to check that the interface, permissions, notifications, etc., are working as you expect.

Tip: A third-party app called [SU for Confluence](#) is often useful in this context. If you are more adventurous, you could probably do something similar with [ScriptRunner](#).

## Examples

- [Adding Multiple Reviews](#) — Add multiple reviews to a content review, set assignee requirements and review dependencies, list ordering
- [Administrator state override](#) — Administrators can force a workflow in to a different state
- [Assignment Examples](#) — Define who can take part in, or be assigned to, a content review.
- [Reviewer Authentication](#) — This example shows how to authenticate reviewers during a content review.

## See also

Administration Guides:

- [Configuration - Global](#) – global app permissions
- [Configuration - Space Tools](#) – space-level app permissions

#### User Guide:

- [Assigning reviewers](#)
- [Assign a task](#)
- [Credentials prompt](#)
- [Page Tools Menu](#)
- [Save as template](#)

#### Workflow Authoring Guide:

- [Expiry Dates](#) – can cause notifications from "Anonymous" and "Comala Workflows" pseudo-users
- [Conditions](#) – limit approvals and some transitions to certain users, groups or workflow roles
- [Notifications](#) – some can be limited to users, groups, workflow roles, etc.
- [Publishing](#) – prevent View-only users seeing draft (unpublished) content
- [Value References](#) – can provide details of users associated with workflow roles

#### Macros:

- [{approval}](#) – can define which users or groups can be reviewers and/or assignees
- [{add-restriction}](#) – add page-level restriction
- [{remove-restriction}](#) – remove page-level restriction
- [{set-restrictions}](#) – remove all page-level restrictions, then optionally add new restrictions
- [{set-message}](#) – can filter message to users, groups and workflow roles
- [{task}](#) – can be pre-assigned to users (or workflow roles if using value references)
- [{workflow}](#) – can optionally define additional **adminusers**