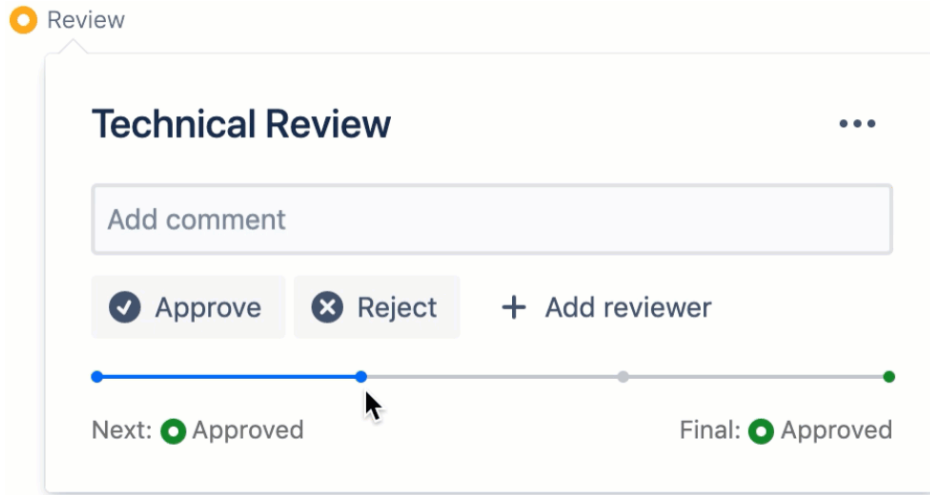


Reviews

Overview

[Content reviews](#) are a crucial part of most workflows.



Often called "Approvals", they are characterized by a decision to **Approve** or **Reject** the content, and based on that decision, the workflow will generally transition to another state.

Defining reviews

One or more reviews can be added to a state using the `{approval}` macro:

```
{workflow:name=Reviews}
  {state:Draft|submit=Review}
  {state}
  {state:Review|approved=Approved|rejected=Draft}
  {approval:Technical Review|assignable=true}
  {state}
  {state:Rejected}
  {state}
  {state:Approved}
  {state}
{workflow}
```

The `approved` and `rejected` parameters on the `{state}` macro determine which states to transition to if the review is Approved or Rejected

Permissions

By default, a user must have [Edit](#) or [Admin permissions](#) in order to take part in a content review.

However, if the App configuration is set to allow anyone to view **Workflow Activity and Drafts** then users with [View permission](#), so long as they are logged in to Confluence, will be able to take part in reviews (since version 4.6).

Reviewers

The people who make the decision to Approve or Reject are called reviewers.

Review

Technical Review ...

✓ Approve ✗ Reject [Avatar] [Avatar] +

Next: ● Approved Final: ● Approved

The [settings of the {approval} macro](#) determine

- if anyone can review
- who can review
- who must undertake the review (and is pre-assigned by the workflow on transition into the content review state)
- if users are allowed to [assign reviewers](#)
- and if the review is assignable you can limit who can be assigned

All assigned reviewers must reach the same decision (all be in agreement) before the review will be considered approved or rejected.

You can use [Events](#) to change this behavior, for example, to facilitate [fast-tracked rejections](#).

Anyone can review

You can set the approval so that Anyone (with **edit** and **view** permission) can undertake the review.

Draft

Review ...

Add comment

✓ Approve ✗ Reject

Next: ● Approved Final: ● Approved

A single reviewer decision will action the approved or rejected transition.

```
{state:Draft | approved=Approved | rejected=Rejected}
  {approval:Review}
{state}
```

Assignable review

The approval can be set to allow one or more users to be assigned to the review.

Draft

Review

Add comment


Approve Reject + Add reviewer

Next: Approved Final: Approved

Once a user is assigned, only that user can undertake the review. But additional users can be assigned if the transition has not taken place.

Draft

Review

Approve Reject  +

Next: Approved Final: Approved

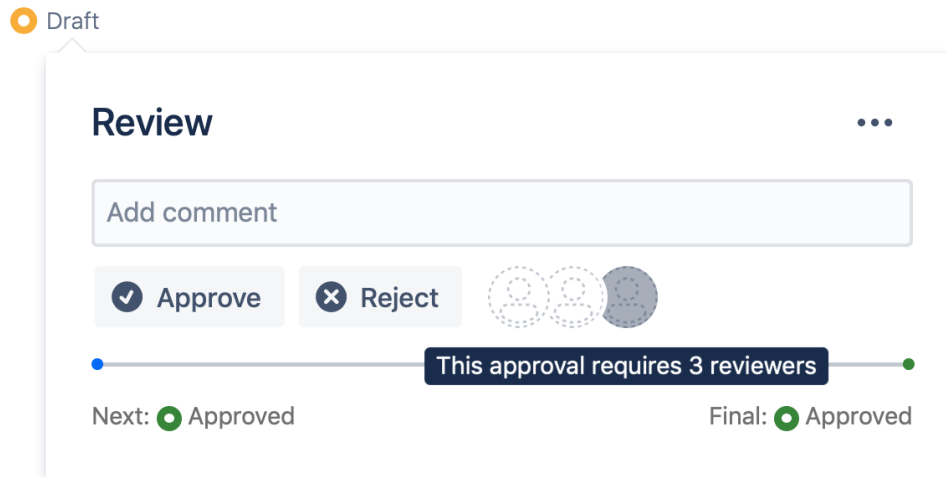
If more than one user has been assigned, all users must agree for a transition to occur.

Users who have not yet undertaken a decision can be unassigned.

```
{state:Draft | approved=Approved | rejected=Rejected}  
  {approval:Review | assignable=true}  
{state}
```

Minimum reviewers

You can set a minimum number of reviewers to agree on the approved decision for the transition to occur.



A minimum can be required when the approval is set so

- **anyone can approve**
- the content review is assignable
- reviewers are limited

```
{state:Draft|approved=Approved|rejected=Rejected}
  {approval:Review|minimum=3}
{state}
```

Limiting who can be assigned

You can also limit who can be assigned.

```
{state:Draft|approved=Approved|rejected=Rejected}
  {approval:Review|assignable=true|user=elle,suni|group=assigners}}
{state}
```

Limiting reviewers

You can simply limit users who can review. Only these users will be able to undertake the review.

```
{state:Draft|approved=Approved|rejected=Rejected}
  {approval:Review|user=elle,suni|group=assigners}
{state}
```

All other users will simply see the **Approved** and **Rejected** options disabled (greyed out) in the workflow popup.

Requiring users to undertake a review

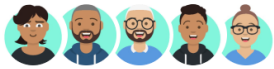
Reviewers can be mandated to undertake a review. On transition into the content review state, the user avatar will be appended to the workflow popup.

Draft (view "Approved")

Review

Add comment

Approve Reject



Next: Approved Final: Approved

All reviewers must agree for a transition to occur.

```
{state:Draft|approved=Approved|rejected=Rejected}
  {approval:Review|user=&milo,simone|group=&review_leaders}
{state}
```

i If the workflow reviewers are changed whilst in a state with assigned reviewers, the changes will only take effect for the content review on the next transition into that content review state.

Multi-group reviews

In cases where more than one team of reviewers is required, rather than adding the teams to a single approval, just add more {approval} macros to the state and use a different approval for each team.



You can also use [conditions](#) to set the order in which the approvals in a state are undertaken.

Credentials

Reviewers can optionally be required to verify their credentials before making a review.

Review

Technical Review

elle  

Add comment

Approve Reject

Next: Approved Final: Approved

Each approval can be edited to require credentials for the reviewers. Global administrators can set the method of authentication.

See: [Reviewer Authentication](#), [Credentials prompt](#), [E-Signatures](#), [E-Signatures Configuration - Global](#)

Notifications

By default, assignees and page watchers will receive notifications about the review progress, and all interactions will be tracked in the [Activity Report - Content](#).


Approval role

Use the optional approval role feature to record the roles that your approvers are performing. This is a more flexible method of capturing roles compared to named reviews and allows you to easily assign ad hoc roles when necessary.

● In Progress

Assign for Review this page

Search for a user, then select from the list.

 **Suni Conn**
suni

- Developer
- Lead Product Owner
- UX Designer

When creating a workflow using [workflow builder](#), to use approval roles, open the advanced section of 'Edit approval' and tick 'Enable roles'

▼ ADVANCED

Credentials

- Non required
- Requires password
- Requires username + password

Set custom action labels

Approve Reject

Conditions

Condition Value Invert +

Find out more about how conditions work [here](#).

- Remember reviewers
Any subsequent reviews in the workflow that have the same name as this review will automatically have the same reviewers assigned (sticky assignees)
- Enable Roles
Allows to add roles to reviewers

Apply Delete Cancel

Roles can also be enabled in the [{approval} macro](#) by including the `roles=true` parameter.

Clear History will remove any added approval roles. Note this will also remove all workflow history.

Macros

- [approval macro](#) — Add content-focussed reviews to states
- [approve-children macro](#) — Approve approvals on child pages
- [approve-page macro](#) — Approve an approval
- [reject-children macro](#) — Reject approvals on child pages
- [reject-page macro](#) — Reject an approval

Events

All aspects of the review process generate [Events](#), which can be used to [Trigger Actions](#).

Reviewer assignment events:

- `pageapprovalassigned`
- `newsapprovalassigned`
- `approvalunassigned`

Approval events:

- `pageapproved`
- `newsapproved`
- `pagerejected`
- `newsrejected`

App configuration

Setting	Where	Notes
---------	-------	-------

Workflow Activity and Drafts Visibility	<ul style="list-style-type: none"> • Configuration - Global • Configuration - Space Tools 	<p>Who can see the workflow and draft content?</p> <p>If set to Everyone, then View-only users can also participate in the review.</p>
Page Update Reset Approval	<ul style="list-style-type: none"> • Configuration - Global • Configuration - Space Tools 	<p>During an active review, if the content is updated should existing approvals be reset?</p>
Approval Comment	<ul style="list-style-type: none"> • Configuration - Global 	<p>Should comments be mandatory when participating in a content review?</p>
Approval – Assignee	<ul style="list-style-type: none"> • Notifications - Global • Notifications - Space Tools 	<p>Should assigned reviewers receive email notifications about the content review?</p>
<code>.approval.minquery</code>	<ul style="list-style-type: none"> • Advanced Configuration - Global 	<p>Set how many characters must be typed when searching for reviewers</p>

Examples

- [Adding Multiple Reviews](#) — Add multiple reviews to a content review, set assignee requirements and review dependencies
- [Advanced different-space publishing](#)
- [Advanced remote-space publishing](#)
- [Assignment Examples](#) — Define who can take part in, or be assigned to, a content review.
- [Fast-tracked Rejections and Approvals](#) — How to require everyone to Approve, but only need one person to Reject
- [Make tasks disable a review](#) — Two ways to use tasks to disable a review. The first way uses a precursor task state where the tasks can be set and completed. The second example uses a [Value Reference](#) as a [condition](#) to check that all tasks are complete. For the [value reference](#) method, you will need the [Reporting for Confluence app](#) in addition to Comala Document Management.
- [Reviewer Authentication](#) — This example shows how to authenticate reviewers during a content review.
- [State expiry dates](#) — Using state expiry dates, defining them with metadata, and making them editable

See also

Workflow Authoring Guide:

- [States](#)
- [Transitions](#)
- [Events](#)
- [Roles and Permissions](#)

User Guide:

- [Content reviews](#)
- [Status Indicator Circles](#)

Reporting Guide:

- [Workflow Report Macro - Approvals](#)