Connecting Users to Categories and Spaces

You can assign users to Categories and Spaces. For Categories this can be done in the Site Builder.

**Go to:** Site Builder > Category listing > Settings cog > Connect Users.

For Spaces, space admins can hover over **Space Users** and edit accordingly.

### Connecting Users to Categories

This means the users are assigned to that category as a workspace. It does **not** mean they have special view permissions or administrative rights.

Admins can connect individual users, user groups, or create a user role. This can be edited within the Site Builder category listing or directly from a dropdown subcategory menu.
Note that connecting roles, users and groups act as labels assigning users to a workspace. They do not give any permissions or administrative rights to the user.

Roles

With our app you can assign roles to a user in a category. This is done by selecting a user, and assigning a role title for that user. The role title could be a small descriptive entry of the users role within this category. E.g. Project Lead, Supervisor, Contact person. RefinedTheme will give suggestions for the most common role titles to speed up the creation of roles.

Displaying Roles

User roles can be displayed in a category drop down menu, on a site home, a category home and/or on a space.

To display a user on a category dropdown, add a user to Roles within that category setting and they will automatically show up.
To display user roles on a Site or Category home:

1. Open up the layout editor on the category
2. Add the content module called Users in Category to a section.
To display user roles on a space:

1. Click the edit button next to Space Users
2. Add the users
3. Save!

Your browser does not support the HTML5 video element

You can choose to only display the users in the category with a role by checking *Roles only.*

**Permissions**

Confluence administrators can manage users for each category and subcategories through the Site Builder view permissions. Any user included as a category admin can manage users for that category and any subcategory visible for that user. The category admin will access the connect users settings from the category layout editor home.

**Integration with macros**

**Users In Category**

The *users in category* macro will display the users linked to the specified category, or if no category is specified, the current category (useful on category dashboards). In the macro you can specify the layout to use whilst presenting the users and if you should only display users with assigned roles.

**User details macro**

The user details macro can be configured to display what categories and spaces a user is a member of. If the user has any assigned roles these will be displayed as well. These 'memberships' will only be displayed while using *layout: full.*

**Users Macro**

In the same way as the user details macro can be configured to display categories and spaces a user is a member of. Again, these will only be displayed while using *layout:full.*

**Organizing users into spaces**
Linking users to spaces works the same way as linking users to categories. The difference being that users linked to spaces will only be displayed through the Users In Space macro - a macro introduced in Original Theme 4.2 together with the linking users functionality. The macro has been included in the space layout templates (all except the public space layout).

Permissions

Confluence administrators and space admins will be able to access the Manage users dialog from the Users in space macro on a space or page.

Integration with macros

Users In Space macro

The users in space macro will display users and roles linked to the specified space. If no space is specified the users from the current space will be displayed.

User details macro

The user details macro can be configured to display what categories and spaces a user is a member of. If the user has any assigned roles these will be displayed as well. These ‘memberships’ will only be displayed while using layout: full.

Users Macro

In the same way as the user details macro can be configured to display categories and spaces a user is a member of. Again, these will only be displayed while using layout: full.

Manage users dialog

The manage users dialog is where an Confluence administrator, Category admin or Space admin (depending on if it’s a space or a category) can manage roles and users linked to a certain category, subcategory or space. The dialog is available from the Site Builder, from the category dashboards, or from the space via the Users In Space macro.

Configuration options

<table>
<thead>
<tr>
<th>Configuration option</th>
<th>Description</th>
<th>Available for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>If opened from the category dashboards, this option let’s the admin switch between subcategories to select what category/subcategory to edit</td>
<td>Category</td>
</tr>
<tr>
<td>Roles</td>
<td>Adding a role expands two fields allowing the admin to search for a user by full name or username, followed by a filed to define the Role title. Here the most popular role titles will be available as suggestions as well.</td>
<td>Category / Space</td>
</tr>
<tr>
<td>User groups</td>
<td>Search for user groups defined in Confluence. Adding a group will link all containing users to this category /space.</td>
<td>Category / Space</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Users</td>
<td>Search for users by full name or username and select them to link them to this category/space</td>
<td>Category / Space</td>
</tr>
<tr>
<td>Visible</td>
<td>Toggle whether or not the linked users should be visible in the category dropdown. If not checked the list will not be available in the category dropdown. It might still display users in any Users In Category macro.</td>
<td>Category</td>
</tr>
<tr>
<td>Only display roles</td>
<td>Enabling this will only show users with assigned roles and not other users included through the users or user groups fields. The same functionality is available for spaces through the parameters in the Users In Space macro</td>
<td>Category</td>
</tr>
</tbody>
</table>

### Related macros

- **Users In Category**
- **Users In Space**
- **User Details Macro**
- **Users Macro**