Manual Category Permissions for Performance

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Background

Refined for Confluence Server is built upon the permission system of Confluence. This means that by default

- Any Refined Category that contains a space you can see will be visible to you
- Any user logged in that is a System Administrator, or a Confluence Administrator, will see all Refined Categories.

Learn more about Refined Categories

Space permissions still rule

Permission settings on spaces are always applied when using Refined. A user that is not allowed to see a space will not see the space even if they can see the category above it.

Similarly, hiding a category containing a space will not hide the space to a user. If the user has a url, link or searches, the space will still show up if the settings on the space allows it.

How this affects a large instance

What happens under the hood is that when a user logs in, Refined is calculating which categories should be visible. This means that the more spaces and categories there are, the heavier these calculations will be, which can affect performance.

Manual Category Permissions

Manual Category Permissions means that instead of iterating through all the spaces to see which categories are visible, the category permissions are checked.

Benefits

The benefits to this is that as an admin you are able to set what categories are shown to the user.
Example: Even if you were to replicate the exact setup with the manual category permission settings, this will impact the time to render the page.

Manual Configuration

Though small in comparison to the benefits, an admin will need to manually keep track of all the categories vs Confluence User Groups. We recommend this approach for customers who are experiencing performance issues or have users that are part of many user groups, or that have a lot of spaces and a complex structure.

How to set up Manual Category Permissions

1. **Enable Manual Category Permissions**
   Go to Theme Configuration > Configuration > Category tab, check the "Use manual category permission settings".
   This will affect your instance directly, meaning that until you have set the specifications for categories for your Sites in the Site Builder, what the users sees might be affected.

2. **Site Builder setup**
   Next, go to the Site Builder. Next to any category that does not have a configuration for the category permission there will be an icon.

   *Uninitiated category permissions*
Initiated category permissions
Configuring Categories

Edit each of the categories to make your settings. There are three levels of settings:

- Anonymous users - this means that the category will show for any anonymous users (not logged in) as well as any logged-in user.
- Logged in user - this setting will make the category show up when a user is logged in.
- Groups - with this setting you can manually add the Confluence user groups that will be allowed to see this category.
Additional Sites

In Refined, additional sites are the sites that are not the Global Site. For these sites there is one additional option for the manual category permission.

- **Inherit - use the same as for the site**

This option is available because for each additional site you have set the permissions on that site, and if you want to use the same ones, let's say "Logged in Users", this will be what the categories get. One thing to note here is that this may result in categories being shown that do not contain any spaces.

*Inherit option*
Learn more about Manual Category Permissions setup

Contact support