Aura Workflow Migration Playbook

A Practical Guide to Planning, Executing, and Optimizing Your Confluence Workflow Migration

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Executive Summary

Workflow migrations are often viewed as technical projects focused on replacing one application with another. In practice, a successful migration involves much more than moving configurations between platforms.

Over time, organizations develop workflows that support document approvals, publishing processes, governance practices, and cross-team collaboration. These workflows represent years of operational experience, business decisions, and organizational learning.

Aura Workflow brings document workflows, approvals, publishing controls, notifications, and governance capabilities together within a single Confluence application. By combining these capabilities in one solution, Aura Workflow helps teams manage the complete content lifecycle while reducing the complexity that can come from managing separate workflow and publishing tools.

A migration is an opportunity not only to modernize technology, but to evaluate existing processes, simplify where appropriate, and create a workflow environment that better supports how teams work today. Whether migrating from Comala, Appfox, another marketplace solution, or a custom-built environment, the principles remain the same:

- Understand the business processes workflows support.
- Preserve the processes that continue to provide value.
- Simplify where complexity has accumulated over time.
- Design a workflow environment that can evolve with the organization.

Introduction

Organizations rarely create complex workflow environments overnight. Most workflows evolve gradually as teams grow, processes mature, and requirements change. What begins as a straightforward approval process may expand over years to include additional review stages, publishing requirements, governance practices, and exceptions.

These workflows reflect how teams collaborate, how decisions are made, and how organizations ensure that important information is appropriately reviewed and shared. For that reason, a successful migration begins with understanding what those workflows accomplish, not simply how they were configured. The goal is not to recreate every existing workflow exactly, but to use migration as an opportunity to simplify accumulated complexity and build a model that supports both current and future needs.

Understanding Your Current Workflow Environment

A successful migration begins long before any technical change is made. The most important decisions happen during planning: understanding the current environment, identifying business requirements, engaging the right stakeholders, and defining what success looks like once migration is complete.

While every organization's journey is unique, successful migrations tend to share a few characteristics:

- A clear understanding of existing workflows and their purpose.
- Alignment between technical teams and business stakeholders.
- A considered approach to simplifying unnecessary complexity.
- Communication and preparation for users throughout the transition.
- A long-term plan for workflow ownership and governance.

Before migrating, organizations should understand what they currently have and why it exists. Many workflow decisions that look complex today were originally designed to address a legitimate business need. Without that context, teams risk either removing valuable processes or carrying unnecessary complexity forward. Useful questions at this stage include:

- What business process does this workflow support?
- Who relies on it today?
- Which steps provide meaningful value, and which may no longer reflect current needs?
- How will the workflow need to evolve in the future?

Start with Content and Governance Requirements

Not all Confluence content requires the same level of workflow control. Some pages need formal approval before publication; others need only lightweight review, ownership tracking, or periodic validation. Identifying the types of content an organization manages, and the level of governance each requires, ensures new workflows support actual business needs rather than recreating historical processes. Consider questions such as:

- Which content requires approval before release?
- Which information requires regular review?

- Which content has regulatory, compliance, or business impact?
- Which teams own the content lifecycle?

Understand Participants and Identify Opportunities to Simplify

Workflows are most effective when ownership and responsibilities are clear. Identify everyone involved across the content lifecycle — creators, reviewers, approvers, space administrators, and workflow owners — and evaluate whether existing processes still reflect current responsibilities or whether ownership has changed over time.

Migration often reveals workflows that are no longer in use, approval stages that no longer add value, duplicate processes across spaces, or manual steps that could be standardized. Rather than transferring existing complexity into a new system, migration is an opportunity to create a cleaner, more maintainable workflow model, and a foundation for making informed decisions about what to migrate, simplify, or redesign.

Mapping Workflows to a Future State

Once the existing environment is understood, the next step is determining how those processes should translate into a future-state workflow model. A common mistake is attempting to recreate workflows exactly as they exist today, which carries forward outdated approval steps, unused states, and processes that no longer reflect how teams work. Instead, evaluate each workflow based on the business outcome it supports, with the goal of workflows that are easier to understand, maintain, and adapt.

Map Business Requirements, Not Application Features

Different solutions use different terminology and configurations to solve similar challenges. A workflow state in one application may have no direct equivalent in another, and matching every feature one-to-one tends to reproduce complexity. Begin instead with the purpose of each workflow:

- What decision or action does this workflow support?
- Who needs to participate?
- What information is required before approval?
- What happens after approval is completed?
- Which steps are required, and which may no longer provide value?

Identify Opportunities to Standardize

Similar processes often develop differently across teams or spaces — separate approval workflows for similar content, each with slightly different steps, terminology, or ownership. Migration is an opportunity to standardize where it makes sense, which can reduce administrative overhead, improve user understanding, simplify ongoing maintenance, and create a more predictable content lifecycle.

Design for the Future, Not Just the Migration

The most successful migrations consider how workflows will be managed going forward, not only the transition itself:

- How easy will it be to update workflows?
- Who will maintain them?
- Can new spaces or teams adopt existing patterns?
- Will administrators understand how workflows are structured?

A migration is complete when the new workflow environment supports the organization's future needs — not simply when existing workflows have been recreated. Creating an environment teams can manage, adapt, and scale is as important as the transition itself.

Planning and Executing Your Migration

By the time organizations reach the migration stage, much of the important work has already taken place. They have evaluated their current workflows, identified opportunities to simplify, and begun designing a future state that better supports their teams.

The migration itself is where those decisions become reality. A successful transition requires thoughtful planning, clear communication, and a willingness to validate assumptions before moving at scale. While every organization's migration will differ, successful projects typically move through six broad phases: discovery, design, pilot testing, validation, migration, and ongoing optimization.

Discovery and Preparation

Discovery is about creating a shared understanding of the migration before any technical work begins. This is the time to establish scope, identify stakeholders, and confirm what success looks like for the organization. Investing time here reduces uncertainty later and gives everyone involved a common point of reference as decisions are made.

During this phase, teams should consider questions such as:

- Which Confluence spaces are included in the migration?
- Which workflows are business-critical?
- Who will own each workflow after migration?
- What communication or training will users need?
- Are there integrations or dependencies that require additional planning?

Design and Migration Planning

Once the current environment is understood, teams can begin designing their future workflow model. This is where the principles discussed earlier become especially important. The goal is not simply to recreate every existing workflow, but to determine which processes to maintain, simplify, combine, or redesign. A well-defined migration plan establishes priorities, clarifies responsibilities, and creates a roadmap teams can follow with confidence.

Pilot Before Full Migration

A pilot migration provides an opportunity to validate both the migration approach and the future workflow design before expanding to the broader environment. Rather than selecting only the simplest workflow, choose one that reflects the complexity your teams encounter every day. A representative pilot is far more valuable than a perfect pilot.

A successful pilot should help validate:

- workflow design
- permissions
- approvals
- notifications
- user experience
- administrative processes

The lessons learned during a pilot often improve subsequent migrations.

Validation and Transition

By the time a migration reaches the validation stage, the technical work may be largely complete, but the transition itself is not. This phase confirms that workflows behave as expected and prepares users for the changes ahead. Successful transitions are as much about communication as technology: even the most carefully designed workflow can create frustration if users are uncertain about what has changed or where to turn for guidance.

Validation should confirm:

- workflow behavior
- approval paths
- permissions
- notifications
- publishing requirements
- user access

Communication should help users understand:

- what is changing
- when the change will occur
- where to find support
- how the updated workflows will improve their day-to-day experience

A technically successful migration is only part of the outcome. Lasting success comes when people feel confident using the new environment from the very beginning.

Migration Is the Beginning

Completing a migration is an important milestone, but it is not the end of the journey. Once new workflows are in use, organizations can observe how they perform in day-to-day operations, gather feedback, and continue refining the overall experience.

The post-migration period provides an opportunity to:

- refine workflows
- improve documentation
- identify additional automation opportunities
- establish governance practices

Companies change, teams grow, governance evolves, and new requirements emerge. The most successful workflow environments are designed with that reality in mind, making it easier to adapt over time rather than requiring another major redesign a few years later.

Applying These Principles to Your Migration

These principles apply regardless of the workflow solution an organization uses today. Every migration benefits from understanding the business processes being supported, identifying opportunities to simplify, and preparing teams for successful adoption.

At the same time, each migration has its own considerations. Workflows, governance practices, and business requirements often reflect the capabilities and design philosophy of the platform they were built on. Understanding those differences helps organizations make more informed decisions while preserving the processes that continue to deliver value. The following sections explore considerations for the most common Confluence workflow solutions.

Migrating from Comala to Aura Workflow

Organizations using Comala have often invested significant time refining workflows that support document approvals, publishing processes, and governance across Confluence.

Many of these environments have been built across separately licensed applications, including Comala Document Management and Comala Publishing. While this approach has supported effective governance and content management practices, it can also introduce additional administrative considerations when managing multiple applications, configurations, and licensing models. Aura Workflow brings these capabilities together within a single Confluence application, providing a unified approach to workflow management, approvals, and publishing.



Those workflows represent years of organizational knowledge and should be treated as valuable business assets during migration. Approval paths, publishing rules, and governance processes are rarely created without purpose. Each one was designed to solve a business need at a particular point in time.

While some workflows may have evolved or become more complex over the years, they often represent valuable organizational knowledge that should be understood before any migration decisions are made. For that reason, a successful migration from Comala begins with understanding how those workflows support the business, rather than focusing solely on their configuration within the application.

By approaching migration from a business perspective first, teams are better positioned to preserve the processes that matter while taking advantage of opportunities to simplify, modernize, and improve the overall workflow experience.

Identify Opportunities to Consolidate

As teams evaluate their existing workflows, many discover that capabilities originally distributed across multiple applications can often be consolidated into a simpler, more cohesive workflow model.

This is particularly common in environments where document approvals and publishing processes have evolved independently over time.

While separating these functions may have been the right decision when those workflows were first implemented, migration provides an opportunity to evaluate whether those distinctions continue to support the organization's current needs.

Rather than recreating historical application boundaries, organizations should focus on the business outcomes they are trying to achieve.

Migration Approach

A successful migration from Comala begins with understanding the workflows, publishing processes, and governance practices that support the business today.

A thoughtful transition typically includes:

- Reviewing existing Comala Document Management and Comala Publishing usage.
- Identifying workflows, approval paths, and publishing requirements that should be preserved.
- Mapping existing business processes to the future Aura Workflow environment.
- Validating approvals, publishing behavior, permissions, and user experience.
- Transitioning teams to the new workflow model while establishing long-term ownership and governance.

By focusing first on the business outcomes workflows support, teams can preserve valuable processes while taking advantage of opportunities to simplify and consolidate their workflow environment.

In many cases, simplifying the overall workflow experience reduces administrative overhead, improves consistency, and makes workflows easier for both administrators and end users to understand.

Aura Workflow reflects this same philosophy by helping organizations create workflow environments that balance governance, flexibility, and long-term maintainability, bringing document workflows and publishing capabilities together in a single application that simplifies administration while preserving the governance and approval processes that matter most.

Supporting Long-Term Governance

Successful workflow environments are designed not only for today's requirements but also for tomorrow's.

As organizations grow, governance practices inevitably evolve. New teams are created, responsibilities shift, compliance requirements change, and business priorities adapt. Workflow platforms should support that evolution without requiring them to redesign their underlying processes repeatedly.

Rather than viewing migration as the conclusion of one platform and the beginning of another, organizations can view it as an opportunity to establish a workflow environment that is easier to understand, easier to manage, and better prepared for future growth.

Migrating from Appfox Workflows

While every workflow platform presents unique migration considerations, the underlying principles remain the same.

Successful migrations begin by understanding the business processes being supported, identifying opportunities to simplify, and creating a workflow environment that is easier to manage over time.

Those migrating from Appfox often begin from a different starting point than those migrating from Comala. While governance and workflow automation remain important priorities, many teams are also looking for opportunities to simplify administration and reduce complexity that can develop as workflows evolve.

Those workflows reflect valuable organizational knowledge and should be approached with the same care and respect as any successful workflow implementation. As with any migration, the goal is not to recreate workflows simply because they already exist.

Instead, teams should begin by understanding the business outcomes those workflows support and identifying opportunities to simplify the overall workflow experience.



Simplifying Without Losing Capability

One of the most common opportunities during an Appfox migration is simplifying workflow administration.

As workflow environments mature, new business requirements often lead to additional workflow variations, configuration options, and administrative processes. While each change may have addressed a legitimate need at the time, the combined result can become increasingly difficult to maintain.

Migration provides an opportunity to step back and ask a different question: **How can we achieve the same business outcomes with a workflow environment that is easier to understand and manage?**

That question often leads to simpler workflow designs, improved consistency across teams, and a more maintainable governance model.

Consolidating the Administrative Experience

Rather than viewing workflow management as a collection of separate administrative tasks, migration provides an opportunity to create a more unified experience for both administrators and end users.

Consider questions such as:

- Where can workflow variations be standardized?
- Which administrative tasks can be simplified?
- Are similar business processes being managed differently across teams?
- Can governance be maintained with fewer workflow variations?
- How can future maintenance be made easier?

By approaching these questions from a business perspective rather than a platform perspective, teams often discover opportunities to reduce administrative effort while improving consistency across the organization.

Supporting Sustainable Growth

As growth continues, workflow environments should become easier to manage, not more difficult.

Future-ready workflow environments should support changing business priorities without requiring unnecessary complexity or repeated redesign.

Aura Workflow provides a unified approach to managing approvals, workflow states, publishing processes, notifications, and governance, helping teams simplify administration while maintaining the controls their business processes require.

The development of Aura Workflow has been guided by this same philosophy: helping organizations simplify workflow administration while preserving the governance, collaboration, and publishing capabilities that support their business.

Migration Approach

A successful migration from Appfox begins with understanding how existing workflows support collaboration, approvals, and governance across teams.

A thoughtful transition typically includes:

- Reviewing current workflow configurations and administrative processes.
- Identifying opportunities to simplify workflow variations and reduce unnecessary complexity.
- Mapping existing approval and governance requirements to the Aura Workflow environment.
- Validating workflow behavior, permissions, notifications, and user experience.
- Transitioning teams to a workflow model that is easier to manage and evolve over time.

By focusing on business outcomes rather than existing configurations, teams can preserve the processes that matter while creating a more maintainable workflow environment.

Rather than simply replacing one workflow platform with another, migration becomes an opportunity to establish a foundation that is easier to understand, easier to maintain, and better equipped to evolve alongside the organization.

Migrating from Other Workflow Solutions

While Comala and Appfox represent common migration paths, many organizations have developed approval and publishing processes using a combination of marketplace applications, custom macros, automation rules, or internally developed solutions.

Although the technologies may differ, the migration principles remain remarkably consistent. Successful migrations begin by understanding the business process being supported, documenting governance requirements, and identifying opportunities to simplify the overall workflow experience.

Rather than focusing on recreating technical implementations, organizations should focus on preserving the outcomes those implementations were designed to achieve.

Understand the Process Before the Platform

Custom workflow environments often evolve gradually over many years.

Different teams may adopt different approaches, documentation may become outdated, and original implementation decisions may no longer be well understood. Migration provides an opportunity to reconnect technical implementation with business purpose.

Organizations should consider questions such as:

- Which workflows are actively supporting business operations?
- Which approval processes remain essential?
- Are manual steps compensating for limitations that no longer exist?
- Have similar workflows evolved independently across multiple teams?
- Can governance be simplified while preserving accountability?

By answering these questions first, a stronger foundation is established for any migration regardless of the technologies involved.

Simplify Where It Creates Value



Not every customization represents competitive advantage.

Some customizations solve genuine business challenges. Others reflect historical constraints, legacy processes, or requirements that have changed over time.

Migration provides a natural opportunity to distinguish between the two.

The goal is not to eliminate customization wherever it exists, but to ensure that each

Build for the Organization You'll Become

Every migration is an investment in the future. As organizations continue to grow, workflows should support changing business priorities without becoming increasingly difficult to administer.

This approach helps teams create workflow environments that balance governance, flexibility, and long-term maintainability.

Whether migrating from marketplace applications, custom-built solutions, or a combination of both, the objective remains the same: preserve what matters, simplify where possible, and establish a foundation that can evolve alongside the organization.

Supporting Essential Workflow Capabilities

Organizations migrating from existing workflow solutions can continue to support the core capabilities they rely on today, including approvals, workflow states, publishing controls, notifications, and governance processes.

Aura Workflow is designed to provide these capabilities within a unified Confluence application, helping teams simplify administration while creating a workflow environment that is easier to manage, adapt, and scale over time.

workflow continues to deliver meaningful value while remaining understandable and maintainable for the people responsible for managing it.

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Migration Readiness Checklist

Before beginning your migration, take time to confirm that the right conversations have taken place, not simply that the technical work is ready to begin.

Understand Your Current Environment

- [ ] Identify workflow owners.
- [ ] Document business objectives.
- [ ] Inventory existing workflows.
- [ ] Review governance requirements.
- [ ] Identify integrations and dependencies.
- [ ] Understand publishing requirements.

Design Your Future State

- [ ] Remove unnecessary complexity.
- [ ] Standardize similar workflows where appropriate.
- [ ] Confirm approval responsibilities.
- [ ] Establish long-term workflow ownership.
- [ ] Document future governance processes.

Understand Your Current Environment

- [ ] Develop a migration plan.
- [ ] Identify pilot teams.
- [ ] Communicate expectations.
- [ ] Define success criteria.
- [ ] Schedule validation activities.

Validate and Transition

- [ ] Test representative workflows.
- [ ] Confirm approvals and publishing behavior.
- [ ] Validate integrations.
- [ ] Gather user feedback.
- [ ] Resolve issues before broader rollout.

Continue Improving

- [ ] Review adoption metrics.
- [ ] Simplify workflows where appropriate.
- [ ] Update documentation.
- [ ] Review governance periodically.
- [ ] Continue refining administrative practices.

Common Migration Considerations

Every migration has its own considerations, and the most successful organizations approach those considerations proactively. Rather than viewing potential risks as reasons to delay migration, teams can use them as opportunities to improve planning, communication, and long-term workflow governance.

The following considerations can help organizations prepare for a smoother transition.

Recreating Existing Complexity

One of the most common migration risks is unintentionally carrying forward workflows that have accumulated unnecessary complexity over time.

Existing workflows often reflect years of thoughtful decisions, but they may also contain outdated approval steps, unused states, or processes that no longer align with current business practices.

How to reduce this risk:

Evaluate each workflow based on the business outcome it supports. Preserve the processes that provide value, while simplifying or redesigning elements that no longer serve the organization.

Limited Stakeholder Involvement

Workflow migrations affect more than administrators and technical teams.

The people who create, review, approve, and manage content every day have valuable insight into how workflows operate in practice.

How to reduce this risk:

Include business stakeholders, workflow owners, administrators, and end users throughout the migration process. Early involvement helps ensure that the future workflow environment reflects real-world needs.

Insufficient Testing

Even carefully planned migrations can encounter unexpected challenges if workflows are not validated before broader adoption.

Small differences in permissions, notifications, approvals, or publishing behavior can significantly impact the user experience.

How to reduce this risk:

Use representative pilot workflows to validate the migration approach before expanding to the broader environment. Testing should focus not only on technical functionality, but also on whether workflows support the intended business processes.

Unclear Workflow Ownership

A successful migration does not end when workflows are moved to a new platform. Without clear ownership, workflows can gradually become difficult to maintain and adapt as organizational needs change.

How to reduce this risk:

Establish ownership responsibilities before migration is complete. Define who maintains workflows, who approves changes, and how future improvements will be managed.

User Uncertainty

Even a technically successful migration can struggle if users are uncertain about what has changed or how to use new workflows.

How to reduce this risk:

Communicate early and consistently throughout the migration process. Help users understand what is changing, why it is changing, and where they can find support.

The Next Chapter Begins Here

Every workflow migration tells the story of an organization that has continued to grow, adapt, and improve over time.

The workflows being migrated represent far more than technical configurations. They reflect years of collaboration, governance decisions, publishing practices, and organizational learning. Respecting that investment is the foundation of every successful migration.

At the same time, migration provides an opportunity to thoughtfully evaluate existing processes, simplify where appropriate, and establish a workflow environment that is better prepared for the future.

Whether migrating from Comala, Appfox, or another workflow solution, the principles remain the same: understand the business process, preserve what delivers value, simplify with intention, and design for long-term success.

The development of Aura Workflow has been guided by these same principles, bringing document workflows and publishing capabilities together to help organizations simplify administration while preserving the governance that matters most.

Migration is not simply the replacement of one application with another.

It is an opportunity to strengthen how teams collaborate, publish, approve, and share knowledge across the organization.

The next chapter begins with today's decisions.

Ready to Start Your Migration?

You've got the playbook — now see Aura Workflows in action, check the technical details, or talk to our team about your migration plan.

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