

ClearVision



NINJA

GUIDE TO

X Confluence

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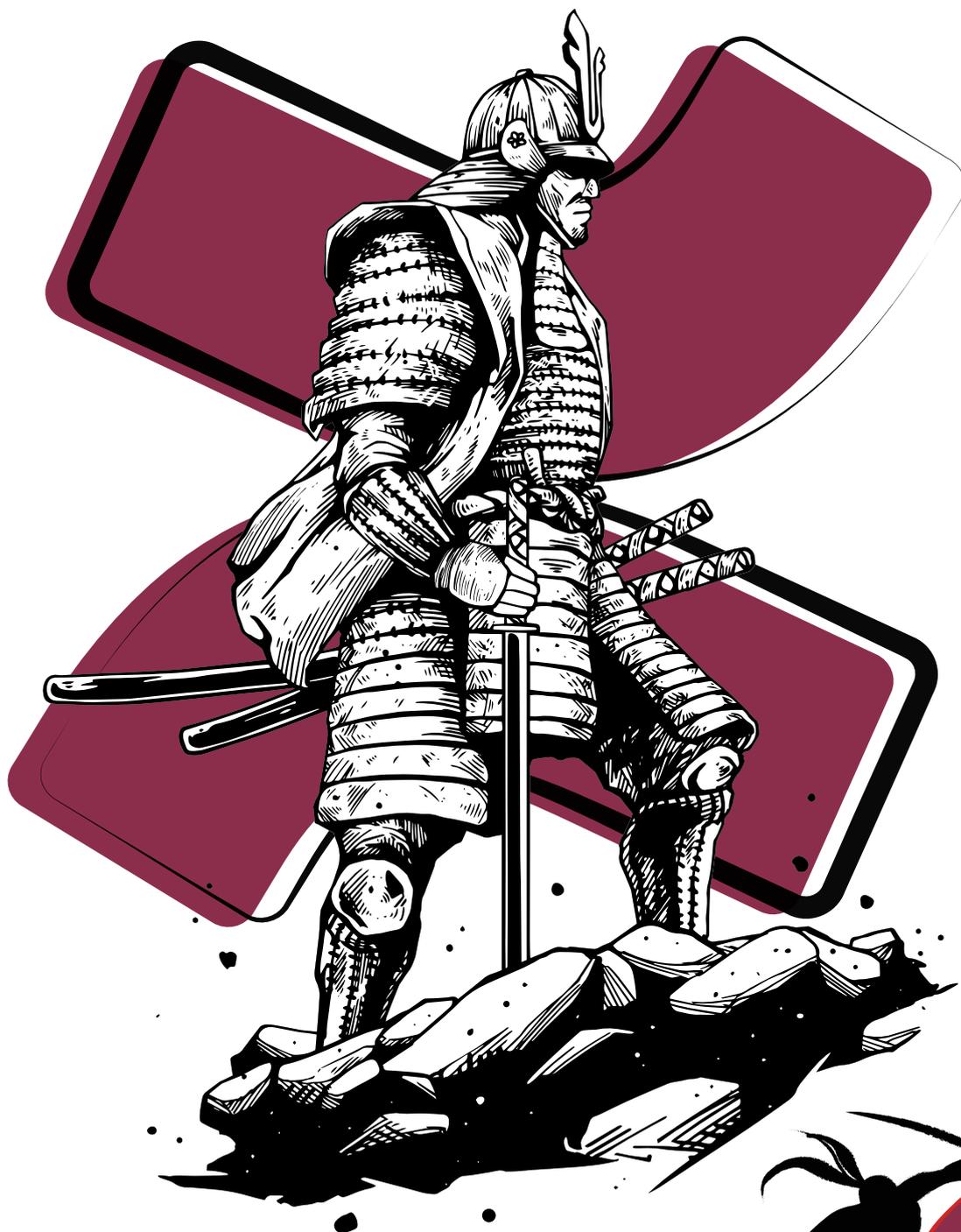
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INTRODUCTION

The following guide is designed to aid users of [Confluence](#).

Confluence is a wiki and collaboration platform that allows you to create, store, manage and share knowledge across departments and the entire organisation. Atlassian users benefit from integrations with the rest of the suite including Jira for complete transparency.

While this guide includes everything intended to help the new user get started, a training course is highly recommended to ensure all of its features are realised.



GETTING STARTED

The architecture of Confluence is fairly easy to understand and consists of two major levels, spaces and pages. Spaces are effectively buckets of information and the typical themes of them are by department or product. Spaces provide an easy way of keeping everything related to one topic together. You are not limited in terms of how many spaces and themes you can have, but it is better to remove doubt by making it clear to end users where information should go.

All spaces are equal in their own right, simply meaning, you cannot put one inside another (like a nested model). There are a few types of spaces you can make out of the box. These fall under knowledge bases, team spaces, personal (great for keeping meeting and private notes), and a blank space. On choosing the most appropriate, Confluence automatically uses a blueprint to create your space. Blueprints are a great place to start, but of course, like the rest of Confluence, the choice is yours, and you can change everything in it to suit you, your team's, and the company's requirements.

Space structure is important and can be organised using pages, i.e. blog posts, documentation, how-to guides, etc. You'll want to make it as easy as possible for users to navigate and find information, all while making it efficient for your team to create and manage knowledge within the space.

Unlike spaces, you can create a page hierarchy where the tree can be used to represent subtopics, but be mindful of the fact page trees can lead to confusion. A Confluence space is not like your computer's folder structure. All pages are equal, so regardless of where the page sits in the hierarchy, it is designed to be full of its own content - searchable, relevant, and as useful as all of those above and below it. It is best to keep the structure as simple as possible, so try to keep it to no more than three or four sub levels.

Confluence ships with hundreds of unique templates built for various requirements. When creating a page, there is a template library on the right side. Atlassian worked with industry-leading vendors to create standardised and efficient page templates to improve collaboration. Using the searching and filtering options, find the template that suits your needs, select and click 'use'. The page will then transform into the template, allowing you to start using it. If you cannot find a template that works, or you have specific ways of working, we cover creating your own further down.

To create a space, you need to have the 'create space' global permission. Your Admins can check to see whether you have this or they can help you create it. Once you have the permission, click the navigation bar and 'create space', provide a name and a meaningful key and create away!



SEARCHING AND LABELLING

One of the powers of Confluence is that your company's knowledge is at your fingertips. For this to work successfully, searching is a top priority. Confluence searching is built on a tiered solution. When a user enters a phrase, Confluence searches every available page for labels, titles, and content. It then prioritises the list of results based on how many times those key points were mentioned on a page. With Confluence choosing labels as its first searching point to match to, it is vital to label your pages with topics.

Labels themselves are system-wide. When you start typing, Confluence searches the entire site for possible matches.

SOMETHING TO CONSIDER

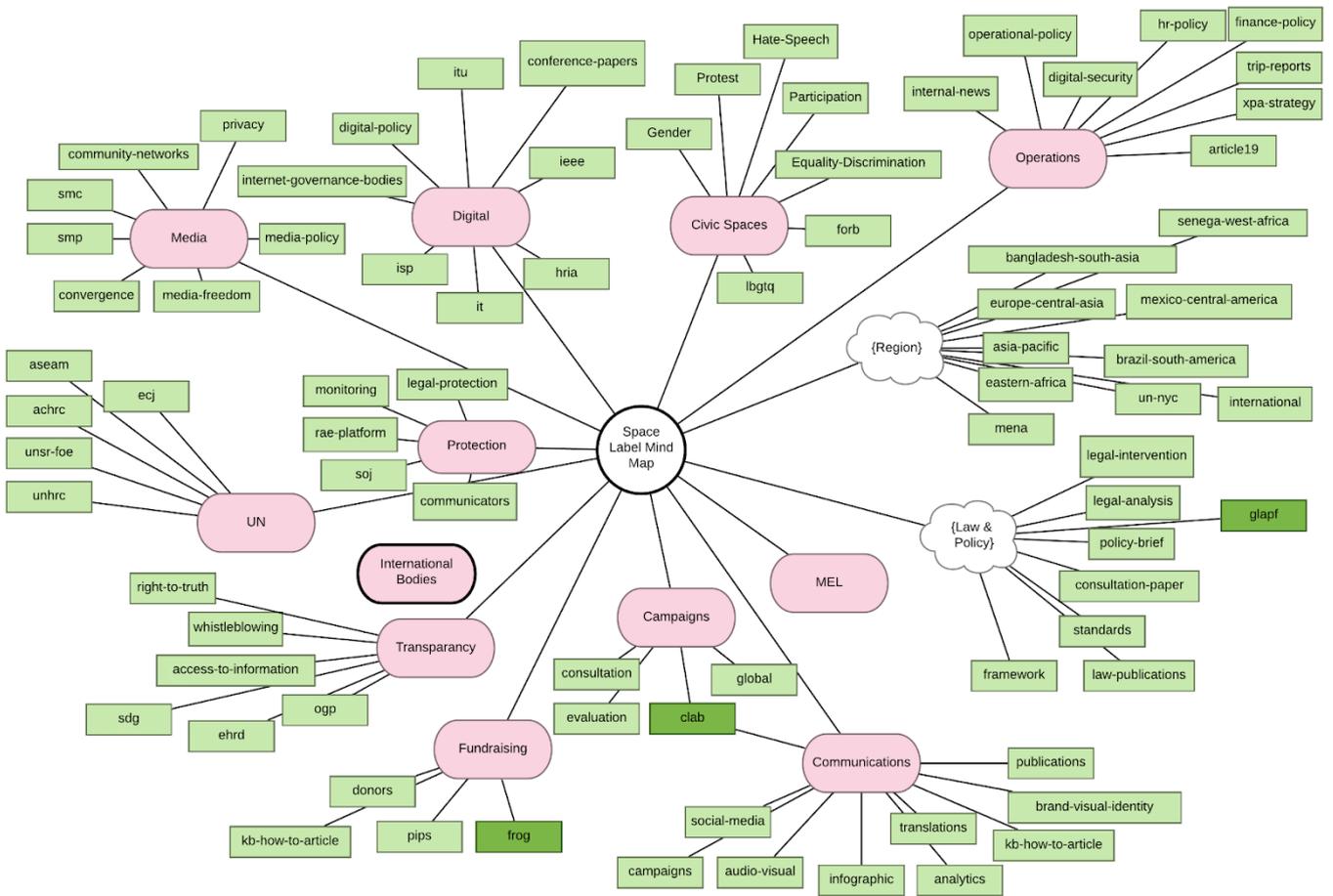
Labels do not work with spaces. If working with multi-word labels, create a standard of '-' or '_' to help.

To add labels to a page, look for the little tag icon when in view mode at the bottom of the page on the right side. When in edit mode, click the ellipsis in the top right corner, then click 'add labels'.

Labels are not only important for search results but in dealing with certain macros. Since labels provide Confluence with another way to group topic-related information, you can use macros, e.g. 'content by label' or the 'labels list' to provide additional functionality to the pages and to easily navigate between content. For example, a user could be looking in a space for an article on user onboarding but not remember the actual title. Using the labels list macro, the user would be able to click on the onboarding label and see all articles where it has been used to find the correct page.

When it comes to labels and getting started, the best way is with a good old fashioned mind map. Mind maps allow team collaboration across different topics. Start with your large chunk work, then all possible sub-topics underneath. Keep going until you have covered all sub-topics. You can use cloud bubbles for particular topics that could sit across multiple areas but are beneficial for searching, etc. Below is an example of a mind map for a legal and legislation department.





PLEASE NOTE:

This is a working document. This diagram should be constantly evolving with you and your team. By constantly evolving this diagram, you can ensure you and your team always have the correct guidance for labelling the structure of your content.

PLEASE NOTE:

The aim of this exercise is not to 'big brother' content creation, but to guide end-users of possible topic labels to add to pages for consistent and accurate search results and navigation.

PLEASE NOTE:

If possible, store the mind map in Confluence, so that it is easy to reach for all users at any time. Using apps like Draw.io or other diagramming tools, you can edit directly from the Confluence page.

When adding to pages, you can then go along the different branches including every bubble you hit as a label. This helps with content appearing in the correct place no matter the level the label is looking at.



CREATING AND EDITING TEMPLATES

There are two types of templates – space and global. Space templates are built and managed and are only available in the chosen space. Global templates are built and managed by Admins but are available in every space by default. Space Admins can disable them in the Space Admin console, but this is by choice.

When creating a page, you will see the template library on the right side of the screen. Atlassian provides hundreds of templates out of the box to help you collaborate better. For searching and filtering options, find the template that suits your needs, and select and click 'use'. The page will then transform into a template. However, you may not always find one that suits your needs, nor is there a template for every situation. To create a global template, head into the Admin Console by clicking the cog in the top right corner. Then click on 'templates and blueprints' on the left side where you can choose to edit an existing default template or create a new one via the 'create new template' button. To create a space template, head into the chosen space, then using the 'space settings' button on the left side, select 'content tools'. There you'll find all default templates, or the ability to create a new one dedicated to that space.

Once you are creating the template, you will recognise the editor. You have the same options in the editor as you do when creating a normal page, however, the two additional assets you have at your disposal are instructional text and variables. The instructional text does exactly as worded. When placed on the page it will provide text, only visible in edit mode, about what a particular section may need to contain. Using instructional text helps guide users to keep standards, uniformity, and efficiency high across the organisation when reviewing and absorbing knowledge in Confluence. Variables are all about collecting specific information reused in the template. Very common use cases can be customer or product names or components on how-to or troubleshooting articles. Variables can come as single-line text, multi-line text or select options. To add instructional text or variables, click the plus icon on the toolbox bar and select the appropriate option.



MACROS

Whilst pages are about content, macros and their additional functionality can help you visualise and promote specific areas of interest so that your users can navigate and absorb the information your page provides. There are over a hundred standard macros that cover a variety of jobs, including page and space navigation, and informative panels that show points of interest like warnings and notes.

The page tree macro is an easy way to showcase the structure found in any space. The default is the current space, however, it can be used to show any.

Notes

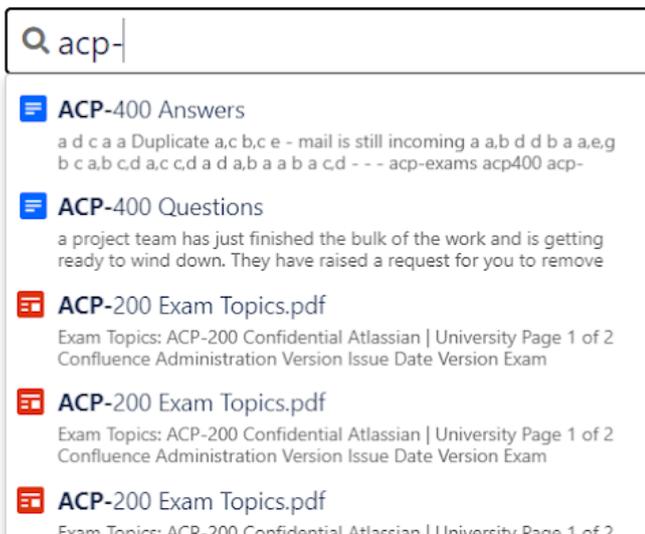
- [Dan Tombs Handover notes](#)
- [F1 Walkthrough](#)
- ▼ [How-to articles](#)
 - [How to review your holiday requests](#)
- › [HR Service Desk Holiday Documentation](#)

The children display macro allows you to quickly insert links to any child pages found under a page. The default is the current page but it can be used to show any.

Items held here

- [Git](#)
- [Hosting Knowledge](#)
- [Plain English Course Notes](#)
- [Riada Insights](#)

Live search is an easy way to incorporate the powerful Confluence search compactly. This macro limits search results directly to the current space or other parameters.



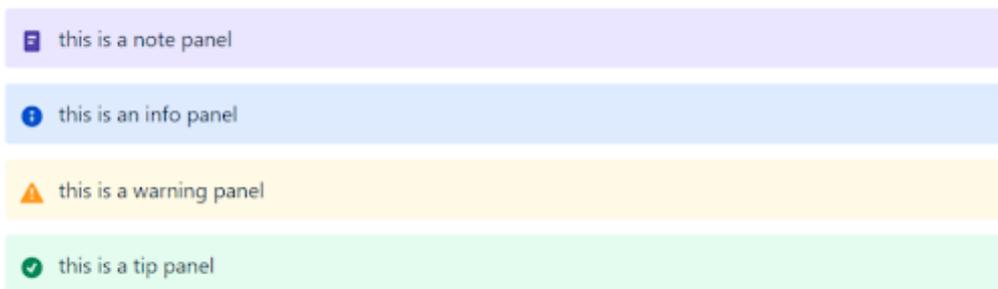
As you build out pages, headings and structure become ever more important. Using the table of contents macro means Confluence will dynamically and automatically build the page navigations based on the headers used, so you can focus more on writing and less on formatting!

Table Of Contents

- [Table Of Contents](#)
 - [ACP-100 based questions](#)
 - [Atlassian Sample Questions \(from the study guide\)](#)
 - [Phil's Questions](#)
 - [ACP-400 questions](#)

Information

The info/warning/note/tip macro is a great way to draw attention to an important piece of information that might otherwise be overlooked. These can especially be useful on policy documents, how-to or troubleshooting guides, or even product documentation.



As you write code, it is important to include snippets in the documentation. To ensure formatting is correct and consistent, use the code block macro.

```
1 This is a Groovy code snippet:
2 def issueLinkManager = ComponentAccessor.getIssueLinkManager()
3
4 if (issue.getIssueType().getName() != "Employee") {
5     def customFieldValue= ""
6     return
7 }
8
9 CustomFieldManager cfMgr = ComponentAccessor.getCustomFieldManager();
10 IssueManager iMgr = ComponentAccessor.getIssueManager();
11 myIssue = iMgr.getIssueObject(issue.id);
12
13 fldBPd = cfMgr.getCustomFieldObjectsByName("Bereavement paid (last 12m)").iterator().next();
14 String relBPd = myIssue.getCustomFieldValue(fldBPd);
15
```



THE ATlassian MARKETPLACE

Confluence, like the rest of the Atlassian suite, was designed to be open and flexible. With the plug and play aspect of the Atlassian Marketplace, you can get additional apps to increase the functionality available from macros. We have chosen a few below that might be of use.

Draw.io

Draw.io is a great diagramming application that provides the ability to get creative and showcase moments where words aren't enough to show your architecture or processes.

Custom charts for Jira in Confluence

This Old Street Solutions app helps bring information from Jira into Confluence for improved reporting and transparency.

PREMIUM CONTENT

Reporting Successful Content

PLEASE NOTE:

The following reporting feature can only be found on the Premium or Enterprise version of Confluence Cloud.

Like any knowledge management system, the most important aspect is keeping information relevant, up to date, and viewable. With Confluence Premium, you can use the built-in reporting capability. Reporting for Confluence provides system, space, page, and attachment level analytics. See who is most active with views and who is contributing the most, both at a space and system level. Find out who has viewed what version of a page at the page level and who has looked at attachments.

With Premium, analytics can be viewed in a few ways. If you want to see the system as a whole, click the 'apps' button on the navigation menu and 'analytics'. You'll then be presented with a view similar to the one shown below. The chart shows views, and pages created and updated. Choose the time and the types of pages and spaces, then compare spaces and how active users are. If you wish to view a specific space, head to it and on the left-hand panel, click 'analytics'. You'll then be presented with a similar view. If you want the analytics of a particular page, next to the title you'll see the 'analytics' button.



Analytics



To change the analytics view permission, you can set this at both a system and space level. As a Confluence Administrator, you have control over who views analytics on your site. This is done by updating the global permissions to allow or deny group access.

1. Browse the Confluence Administration.
2. Click 'security', then 'analytics permissions' in the sidebar.
3. 'Edit', select the groups and click 'save'.

PLEASE NOTE:

- o When no restrictions are applied at the global level, new groups added to your site will have access to analytics.
- o When at least one group is denied access to analytics, all new groups will be denied by default.
- o Anonymous users can't view analytics.

As a Space Administrator, you control who views analytics. Set space permissions by allowing or denying user or group access.

1. Go to the specific space.
2. Click 'space tools', then 'permissions'.
3. Click 'analytics'.
4. Add or remove permissions using the menu provided.



AUTOMATIONS IN CONFLUENCE

No one wants to be pressing buttons or doing meaningless and laborious tasks. Those such as auto-archiving, updating multiple pages with labels, etc., will soon be a thing of the past. Automation within Confluence offers Space and System Admins, with no-code automation, rules that reduce technical debt whilst providing all the power.

In Q3 of 2021, Automation in Confluence was introduced. Based on the Automation for Jira app acquired by Atlassian in 2019, the same IFTTT (IF, This, Then, That) no-code automations will be available in Confluence.

Every rule requires a trigger and at least one action. Typical trigger points are when pages are created, commented on or just on a schedule. Actions include commenting, moving, archiving or deleting. Expect similar notifications to external chat tools like Teams or Slack or even external webhooks that can be sent as actions in the future. Just like the A4J rules, you will also be able to provide conditions to which an automation will be able to fire.

Whilst there is no confirmed date for seeing this feature released in Confluence, its arrival is eagerly awaited. If you are interested in keeping up to date with new releases and improvements to the Confluence Cloud platform, take a look at Atlassian's published [roadmap](#).

ADVANCED LEARNING

From advanced searching to creating and managing projects, there's a lot to learn about Confluence. As outlined at the beginning of this white paper, you'll want to consider an advanced course to expand your knowledge. Courses are available at the admin level for new and experienced users. To ensure you get the most out of your investment in Confluence, consider one of our [training courses](#):

Confluence Essentials (Server, Data Center and Cloud) This course covers Atlassian Confluence concepts and will equip you with everything you need to create and manage knowledge in your company.

Confluence Administration (Server, Data Center and Cloud) This course is ideal for new Confluence administrators responsible for defining and managing spaces and third-party apps.

Jira Essentials (Server, Data Center and Cloud) This course covers Atlassian Jira concepts and will equip you with everything you need to raise service requests while using Jira to manage service desk queues, SLAs, and customer satisfaction.

Jira Administration (Server, Data Center and Cloud) This course is ideal for new Jira administrators who have the responsibility of defining projects and configurations for use in agile teams.

Jira Service Management Project Administration (Server, Data Center and Cloud) This course is ideal for new service team leads and Jira admins who have the responsibility of configuring service projects and service desk portals.



Jira Project Administration (Server and Data Center) Based on the Atlassian certification ACP-600, by the end of this course, attendees will have a solid understanding of both the configurations in their control and the ramifications of requesting changes from an application administrator. Attendees will also learn the best practices of shared schemes, permissions, and project configurations.

All of our training courses are customisable, allowing you to pick and choose modules from other courses which can be tailored and developed in a way that suits your unique requirements.

Mentoring and Coaching (Server, Data Center and Cloud) If you require more specific, one on one training, then sit down with one of our Solution Architects.

