Confluence Tips and Tricks for Improved Knowledge Creation and Management

You're probably already familiar with Atlassian's Confluence. With its intuitive design and modern work management features, it's undoubtedly a powerful recruit for businesses of all sizes.

Not only does Confluence provide a space where teams can compose and search for information, but it also offers tools that speed up information capture, making it easy for your team to capture and find information. The key to using Confluence effectively is knowing how to set it up and integrate it seamlessly with your workflow.

But while you may know the basics, you might not know every tip and trick to get the most out of Confluence. Let's change that today.

One of the biggest complaints about knowledge sharing is that writing takes time away from the main work that needs to be completed. In other words, everyone wants information shared with them, but doesn't want to do it themselves.

This article discusses several tips, tricks, features, and integrations that Confluence offers that make information capture and sharing easier. Setting these up may take some time upfront but will result in significant time-saving benefits in the future. So buckle in, and let's get started.

Confluence Tips and Tricks

Here are some features that Confluence offers and how you can apply them to simplify the capture and sharing of information.

Live Reporting

You can set up live data reports and updates using Confluence and Jira. With 50 percent of teams using Confluence are already using Jira, you could be just a few steps away from streamlining your interdepartmental communications. Jira captures various information like task reports, incidents, and change logs. It's constantly updating to ensure stakeholders have access to up-to-date information.

Development teams typically use Jira, and stakeholders commonly use Confluence. Live Reporting Macros display information in Jira on Confluence dashboards and summaries, ensuring that everyone has the same and most current data, and prevents duplicate data entry.

These updates can provide status reports, including overall status, priority, component makeup, and issue type. They can also publish information on change logs. You can create customized live reporting macros or select from various available macros in the Atlassian Marketplace.

Page Templates

Confluence offers hundreds of page templates that simplify and standardize information capture. For example, you can use project management templates to create the workflow that works for your unique business model. From facilitating brainstorming to documenting decisions, Confluence can help you take care of it.

Each page template is customizable to fit your needs. You can alter it, add sections, or use it as is. Templates are a great tool to help jumpstart the capture and sharing of information.

Avoid Inconsistent Content

Pages containing redundant or inconsistent content are frustrating to users and costly to fix. No one wants to spend time reading content on one page only to find a contradictory piece on another.

To match up information throughout your system, you need a single source of truth. This is where Confluence comes in. Confluence provides two macros (Excerpt and Excerpt Include) that work together to help you embed sections of your pages into other pages.

The Excerpt macro allows you to select a part of a page's content for reuse on another page. For example, if you're using a project status page, when the status changes, you want that reflected on all pages that use that status. When you use the Excerpt macro, any change you make in the excerpt will reflect on all the other places where it's used.

The Excerpt Include macro is placed on the receiving page to connect it with the information selected in the Excerpt macros. These macros constantly update and across all pages based on a select piece of information: your source of truth.

Use Confluence as Your Intranet

The primary purpose of an intranet is to share information across your company. It's where everyone can look whenever they need to know something. Some of your users will be technical, and others non-technical. Therefore, your intranet solution needs to be intuitive and straightforward enough for your entire community to use.

Confluence can help. In addition to being your intranet, it also secures your information by letting you set access authorization to different users. This way, you can enable full access to things like the cafeteria menu while keeping sensitive information such as your business scaling plans limited to relevant stakeholders.

Haaliya Hashniya 43, Azor 5800239 I Tel: +972-3-6133336 I Fax: +972-2-6133435 I Marketing@methoda.com
www.methoda.com
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Additionally, Confluence allows you to create personal pages for individuals and teams. Employees can blog about common issues and best practices rather than send group emails. The blog also ensures an ongoing conversation to keep everyone — including new hires — in the loop.

Make Onboarding Easy

Once you make a new hire, you want to get them onboarded as quickly and smoothly as possible. Unfortunately, the onboarding process has become more challenging due to the increase of remote setups. But regardless of whether you're setting your new staff up at home or in the office, you still need to guide them through multiple steps and forms.

Confluence enables you to document and standardize each step of the onboarding process. You only need to write each step once, and then you can use it to onboard all future employees (until you wish to update the process or information). From technical setup steps to payroll enrollment, Confluence can help guide your new employees throughout the entire onboarding process.

Since each organization's onboarding style is different, check out Atlassian's guide to setting up onboarding in Confluence and other human resource-related topics to determine your unique strategy.

Design Blueprints

Confluence offers access to a variety of blueprints your teams can use. These provide a consistent structure for different pages and content types. For instance, blueprints can be used for meeting notes, design templates, job descriptions, and more.

Here's a list of blueprints that come bundled with Confluence:

- Meeting notes
- File list
- Decision
- JIRA report
- Product requirements
- Retrospective
- Share a link
- Task report

You can use these blueprints out-of-the-box or customize them. For example, a status update package might contain the following pages:

- Executive Summary
- Names of Design, Development, and QA teams
- A page with specific content for each team (such as Focus, Status, Content, and Risks)
- A page template to provide a status report for each team

Haaliya Hashniya 43, Azor 5800239 I Tel: +972-3-6133336 I Fax: +972-2-6133435 I Marketing@methoda.com
www.methoda.com
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You can customize all of these to make a blueprint to suit your specific needs. To learn more, check out this [detailed discussion](#) on creating custom blueprints.

Creating a set of consistent blueprints prevents teams from starting from scratch whenever they want to create any content. Additionally, blueprints are a great help for reconciling information written by different teams, as everything would be captured in the same format.

Make Content Reuse Simple

Earlier, we mentioned using Excerpt macros to keep content consistent and updated. Page templates also serve as a guide as to what content should appear on a given page. In addition to those built-in features, applications from the Atlassian Marketplace, such as [Content Mirror](#), allow you to clone content across pages. Cloning is a powerful feature that automatically keeps content up to date in every location where it appears. This way, employees will have easy access to all the information they need to know without having to check several different pages

Communities of Interest

In Confluence, you can establish sections or pages that relate to specific topics of interest, encouraging collaboration across teams and breaking down information silos.

These community of interest sections can bring together content from within and outside your organization. Blogs can receive wider exposure and comments, and events like webinars and conferences can be published to gain a greater audience. Alerts can be sent to subscribers to the community when additions or changes occur to the page. Community of interest pages can leverage many of the other tips and tricks described in this article to make sharing and collaboration easier.

Conclusion

Confluence provides you with a multifaceted platform for collaboration. It combines standard functionality and flexibility to suit the individual needs of your organization and its associated teams.

While you may be familiar with the general features of Confluence, there may be many features and functions — like the ones discussed in this article — that you aren't currently using, but that can have the most significant impact. The more your teams know about Confluence, the easier it is to use and the more it can help your organization.

If you want to take advantage of all that Confluence offers, check out [Methoda](#), an official platinum partner of Atlassian. From consultations to development to implementation of all Atlassian products, Methoda is here to help with all your Atlassian needs.

Haaliya Hashniya 43, Azor 5800239 I Tel: +972-3-6133336 I Fax: +972-2-6133435 I Marketing@methoda.com
www.methoda.com
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