

Confluence Best Practices Guide

Get the most out of Confluence!

Confluence is a content collaboration software that helps teams create, share and discuss their work. One of the tool's characteristics is its simple and user friendly interface, yet also provides all the necessary features to organize and structure your company's content on one single platform.

Because of the tool's simplicity, it is easy for users to add content without following good practices or guidelines, resulting in an unstructured wiki which can be counterproductive and hard to browse.

It is highly recommended to define a list of guidelines for your users, so they know how they should structure content within Confluence. Below are some general best practices which will help optimize your team's use of Confluence and make information sharing a breeze for everyone.

1. Identify the list of spaces you need to create

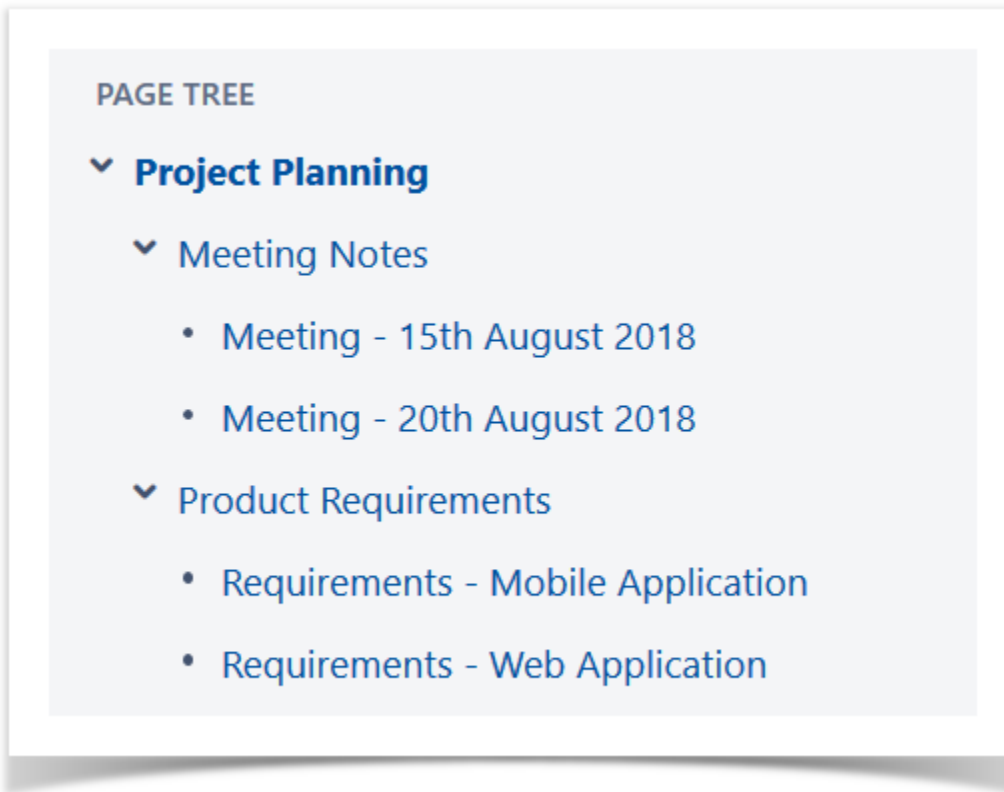
Spaces are like folders, which allow you to organize your content by different categories.

We recommend creating a space per Team (i.e. Finance) or by Project (i.e. Software development).

- ✔ Always check to see if what you're about to create already exists! Use the search bar and do quickly look to see someone has made a page or space dedicated to the content. Confluence is a great tool, but create thoughtfully, don't flood the library with redundant content!
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2. Take the time to define your page structure

In each space, it is important to set up a clear and organized page structure so content is grouped by subject and relevance. You can use page hierarchy to group several pages under one single parent page. For example:



- ℹ Keep track of your materials! Confluence makes it easy to add meeting notes, action items, attachments, etc. to guarantee everything related to your project can be found in one easily accessible location.
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3. Use page templates

Confluence comes with a set of page templates that allow you to:

- Group pages by category of content (i.e. How To articles, Meeting Notes, etc.).
- Have a standard layout and structure for those pages.
- Save your employees' time, as they aren't recreating the wheel with each page.

Confluence gives you the flexibility to set up your own templates and promote them to users, so they'll have easy access to the pages.

To quickly select a Template, simply click the **Templates** button at the top of the Confluence toolbar:



✓ Templates are a great way to quickly create uniform and relevant content for your space. We recommend trying these out:

- Meeting Notes
- Business Status Update
- 1 on 1 Meeting
- OKRs
- To-do List

4. Increase productivity by using Confluence macros

Confluence comes with [a set of useful macros](#) that provide a range of functionalities, which can make your pages more dynamic and customizable. This can enhance the look and feel of your pages while improving the user experience when browsing through content. A full list of macros bundled in Confluence can be found [here](#). Alternatively, the [Atlassian Marketplace](#) offers a range of apps which can give you more choices for third party macros.

Choose a template

Please select one of the following templates.

How To Article

[Add How-To Article](#)

Troubleshooting Article

[Add Troubleshooting Article](#)

Meeting Notes

[Add Meeting Notes](#)







📘 Follow these four easy steps to add a macro to your Confluence page:


1. From the editor toolbar, select the **Insert** button.
2. Select a macro from the list.
3. Enter any required parameters.
4. Choose **Insert**.

5. Organize your attachments


Confluence makes it easy to attach files to your pages, however keep in mind the following best practices:

- Make sure to name your attachments in a way that is meaningful to make it easy for users to browse through them.
- When uploading and updating versions of an attachment, make sure to not rename it. By using the same name, the attachment is replaced rather than duplicated.
- Optionally, you can organize your attachments in folders so all your files can be viewed in a structured manner. This can be achieved by using the [Smart Attachments for Confluence](#) app.

File	Modified
>  Creating Boards and Sprints.pdf	about 4 hours ago by Mitchell Hoback DISH
>  Defect Creation.pdf	about 4 hours ago by Mitchell Hoback DISH
>  Dish Lab Workbook v1.3.pdf	about 4 hours ago by Mitchell Hoback DISH
>  Effective Jira Stories.pdf	about 4 hours ago by Mitchell Hoback DISH
>  JQL Cheatsheet.pdf	about 4 hours ago by Mitchell Hoback DISH
>  Submitting Tickets.pdf	less than a minute ago by Mitchell Hoback DISH

 Drag and drop to upload or [browse for files](#)

[Download All](#)

 Confluence is not a file repository! Instead of adding a bunch of files to a page or a space, either create them natively within Confluence, or convert them into a Confluence page. This lets you dynamically edit and search for information within our instance.

6. Avoid redundant content

Redundant content can be hard to avoid, especially if you need the same content in more than one place within your wiki. However, by duplicating content, it makes it difficult to keep everything updated without it becoming a tedious task.

To avoid this scenario, you can use the [Excerpt](#) and [Excerpt Include](#) macros and embed sections of your pages into other pages.


7. Label your content

Labels are an easy way to group pages and attachments that are relevant to the same topic, making it easier for users to find what they need.

A good rule of thumb is to make sure to choose labels that are relevant and meaningful. When labels are used consistently, you can make use of handy macros such as [Content by Label](#).

8. Grant permissions wisely

It's true that too many cooks spoil the broth. If you have too many administrators, chances are they'll configure Confluence for their own needs rather than taking into consideration a global view, and in effect [too many configurations in different directions can lead to performance issues](#). Make sure to give users the exact permissions they need to perform their work, and minimize the number of system and space administrators to no more than five people.

 Permissions are powerful! It is our recommendation that you start off with minimal permissions, and then add the user permissions as needed. Confluence is an opt-in platform, which means permissions default to view only access.

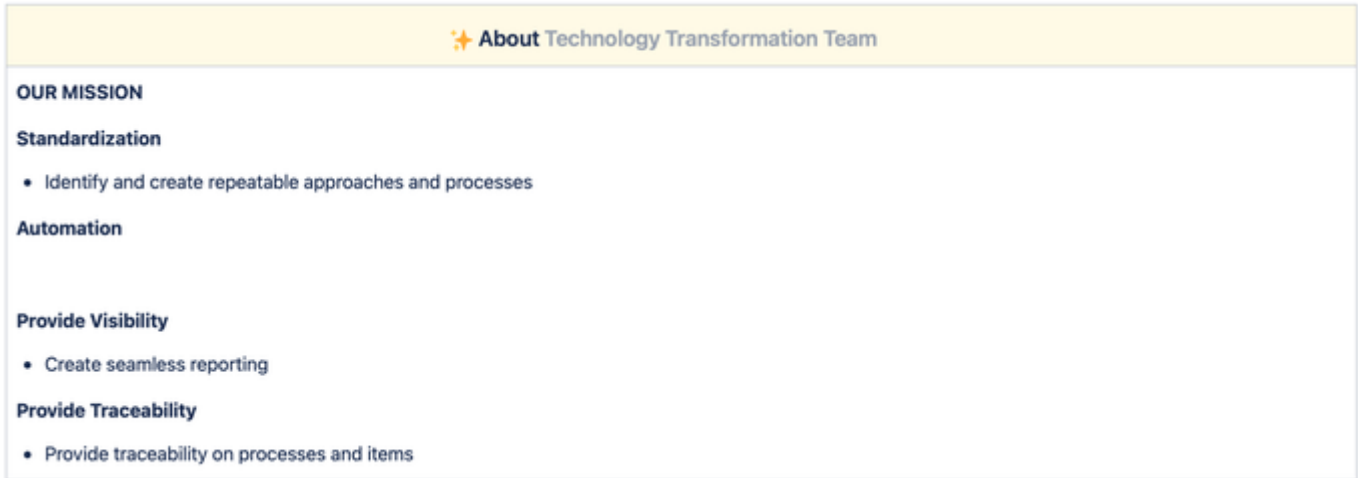
9. Train Confluence users to adopt best practices

Confluence is very easy to use, which can be a double-edged sword – everyone can use Confluence, but over time everyone can also contribute to creating a disorganized wiki if users are not mindful of their actions.

It is crucial to invest in your Confluence users, and train them on why it is important they use the right page structure, add the right labels, use the right macros, etc.

Exemplar Confluence Space

Below are several screenshots of an exemplary team buildout of their Confluence space. We recommend teams model their own spaces in a similar way, as these are proven methods to ensure organization, easy access to tools, and the ability to quickly find relevant documentation to their work.



About Technology Transformation Team

OUR MISSION

Standardization

- Identify and create repeatable approaches and processes

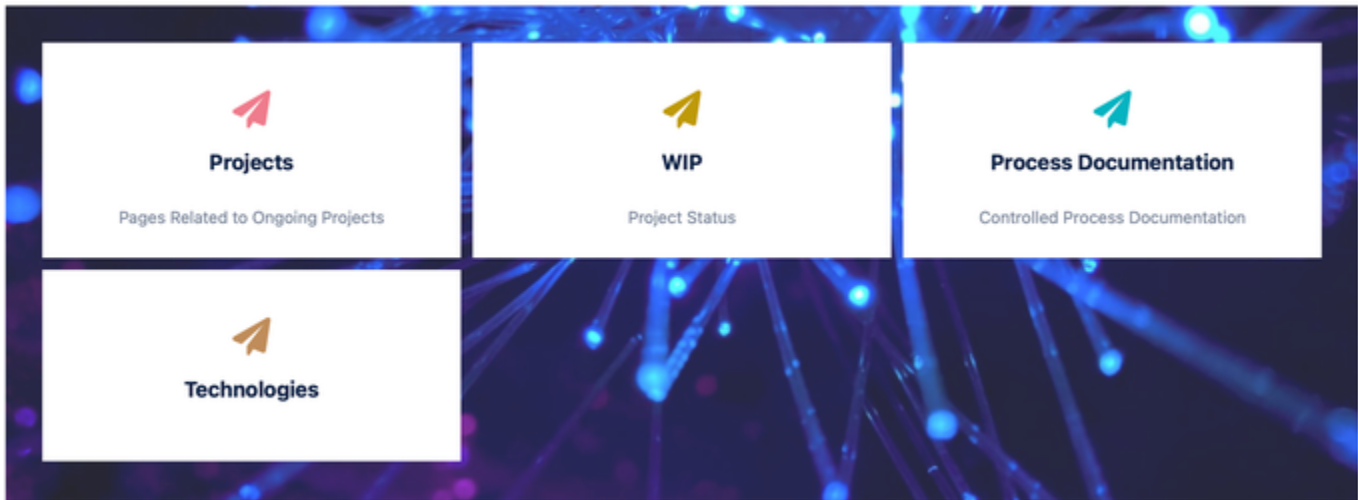
Automation

Provide Visibility

- Create seamless reporting

Provide Traceability

- Provide traceability on processes and items

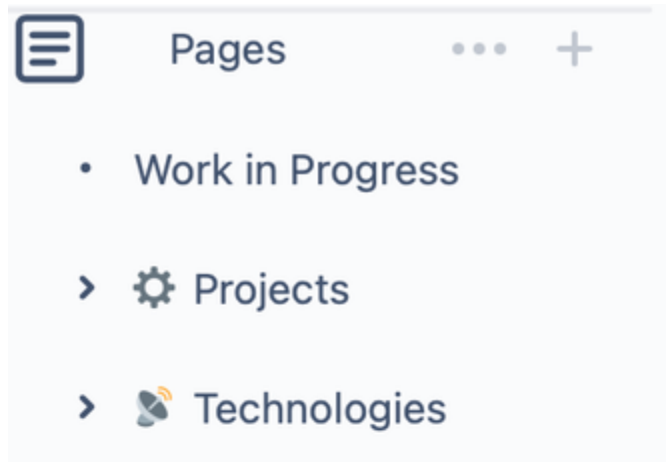


Projects
Pages Related to Ongoing Projects

WIP
Project Status

Process Documentation
Controlled Process Documentation

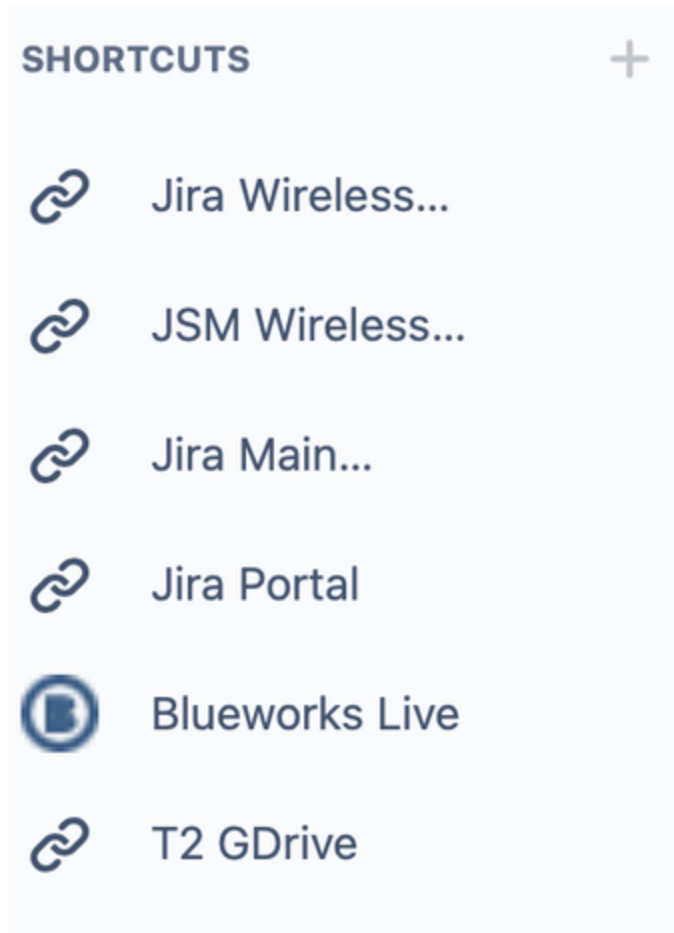
Technologies



Pages

- Work in Progress
- > Projects
- > Technologies

- Meeting Notes (Temp...
- ▼ Controlled Process D...
 - Confluence Usage
 - Change Request ...
 - › Training Material
 - Google Calendar I...
 - › NDA Signing Proc...
 - › Network Technolo...
 - › Quarterly Busines...
 - › Intake Process
 - Boost Infinite - Te...
 - Jira Usage - Proje...
 - › Transition Proces...



Additional Resources

- K15t's [Confluence Tutorial](#) video series in seven videos for a total of 36 minutes
- Atlassian's [Best Practices for Getting the Most Out of Confluence](#) guide
- Ricksoft's [8 Best Practices for Confluence Documentation](#) guide