Confluence Usage Guide

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Overview

Confluence is NovaTech's documentation and wiki platform. This guide covers accessing, creating, and organizing documentation.

Accessing Confluence

Web Access

1. Go to **wiki.novatech.com** or click Confluence tile in Okta
2. Sign in with NovaTech credentials (SSO)
3. You'll see your home dashboard

Mobile Access

1. Download Confluence Cloud app
2. Enter site: novatech.atlassian.net
3. Sign in with work email
4. Approve SSO login

Navigation

Home Dashboard

Your home page shows: - Recent pages you've viewed - Pages in your starred spaces - Recent updates from teams you follow - Recommended content

Spaces

Spaces are top-level containers for content:

Space Type	Purpose	Examples
Team spaces	Team documentation	Engineering, HR, Sales
Project spaces	Project-specific docs	Project Alpha, Q3 Initiative
Personal spaces	Your private notes	Your Name's Space
Archive	Deprecated content	Archive

Finding Content

Search: - Global search bar at top - Use quotes for exact phrases - Filter by space, author, date

Browse: - Space directory - Recent pages - Page tree in each space

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Creating Content

Creating a Page

1. Go to the space where you want to create
2. Click **Create** button
3. Choose template or blank page
4. Enter title
5. Write content
6. Click **Publish**

Page Templates

Template	Use For
Blank page	General content
Meeting notes	Meeting documentation
How-to article	Step-by-step guides
Decision	Recording decisions
Retrospective	Sprint/project retrospectives
Requirements	Product requirements
Troubleshooting	Issue resolution guides

Formatting

Basic Formatting: - Headers (# ## ###) - Bold, italic, underline - Bullet and numbered lists - Tables - Code blocks

Keyboard Shortcuts: | Action | Shortcut | |———|————-| | Bold | Cmd/Ctrl + B | | Italic | Cmd/Ctrl + I | | Link | Cmd/Ctrl + K | | Save | Cmd/Ctrl + S | | Publish | Cmd/Ctrl + Enter |

Adding Media

Images: - Drag and drop - Copy/paste - Insert menu → Image

Files: - Drag and drop attachments - Insert menu → Files and images

Videos: - YouTube/Vimeo embed - Record with Loom (integrated)

Organizing Content

Page Hierarchy

Create child pages under parent pages: 1. Navigate to parent page 2. Click **...** → **Create child page** 3. Or use `/child` on parent page

Labels

Add labels for discoverability: 1. Open page 2. Click **Add label** at bottom 3. Enter label name 4. Labels searchable across spaces

Common Labels: - `how-to` - Instructional content - `policy` - Official policies - `meeting-notes` - Meeting documentation - `decision` - Decision records - `archived` - Deprecated content

Space Organization

Recommended structure:

```
Space Home
  Getting Started
  Processes
     Process 1
     Process 2
```

```
Reference
    Glossary
    FAQ
Meeting Notes
    2024
    2023
Archive
```

Collaboration

Commenting

Inline Comments: 1. Highlight text 2. Click comment icon 3. Add comment 4. @mention people

Page Comments: 1. Scroll to bottom 2. Add general page comment 3. Reply to existing comments

Mentions

- Type @ and person's name
- They'll be notified
- Use for reviews, questions, FYIs

Watch Pages

Get notified of changes: 1. Click **Watch** on page 2. Choose notification preference 3. Or watch entire space

Page History

View History: 1. Click **...** → **Page history** 2. See all versions 3. Compare versions 4. Restore previous version

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Best Practices

Writing Good Documentation

Do: - Use clear, descriptive titles - Add context and background - Include examples - Keep content current - Use templates consistently

Don't: - Create duplicate pages - Use vague titles ("Notes") - Leave drafts unpublished - Forget to update outdated content

Page Titles

Good: - "How to Submit Expense Reports" - "Q3 2024 Sales Strategy" - "API Authentication Guide"

Avoid: - "Notes" - "Document 1" - "Meeting"

Content Maintenance

- Review pages quarterly
- Update after process changes
- Archive obsolete content
- Fix broken links

Macros

Useful Macros

Table of Contents:

```
/toc
```

Status:

```
/status
```

Shows colored status badges

Expand:

```
/expand
```

Collapsible content sections

Panel:

`/panel`

Highlighted content boxes

Code Block:

`/code`

Syntax-highlighted code

Include Page:

`/include`

Embed another page's content

Space Administration

Creating a Space

1. Click **Spaces → Create space**
2. Choose template (Blank, Team, Documentation)
3. Enter name and key
4. Set permissions
5. Create

Space Permissions

Permission	Meaning
View	Can read content
Add	Can create pages
Delete	Can remove pages
Administer	Full control

Setting Permissions: 1. Go to Space settings 2. Click Permissions 3. Add groups or individuals 4. Set permission levels

Space Templates

Create templates for consistent pages: 1. Space settings → Content tools → Templates 2. Create new template 3. Design template with placeholders 4. Team can use when creating pages

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Integration

Jira/Linear

- Link issues to pages
- Embed issue lists
- Auto-update from project tools

Slack

- Share pages to Slack
- Get notifications in Slack
- Search Confluence from Slack

Google Drive

- Embed Google Docs
- Link to Drive files
- Preview without leaving Confluence

Common Tasks

Export Content

Export Page: 1. Open page 2. Click **...** → **Export** 3. Choose format (PDF, Word) 4. Download

Export Space: 1. Space settings → Export 2. Select format and options 3. Download archive

Import Content

From Word: 1. Create new page 2. Click **...** → **Import** 3. Select Word file 4. Review and publish

Move Pages

1. Click **...** → **Move**
2. Select destination space/parent
3. Choose to move children
4. Confirm

Troubleshooting

Can't Edit Page

- Check you have edit permission
- Page might be restricted
- Contact space admin

Page Not Loading

- Clear browser cache
- Try different browser
- Check internet connection

Can't Find Content

- Try different search terms
- Check space permissions
- Ask space admin

Support

- **IT Help:** #it-help or it@novatech.com
- **Confluence Admin:** wiki-admin@novatech.com
- **Atlassian Support:** For platform issues

Related Documents: Documentation Standards (ENG-DOC-001), Knowledge Management Policy (IT-SW-026)