

Confluence Cheatsheet

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In the realm of technical documentation, Confluence stands out as a powerful tool, equipped with a myriad of features designed to streamline the documentation process. This guide delves into the essential Confluence tools, focusing on the versatile macros that enhance your pages, the intuitive tools menu that simplifies formatting, and the advanced table functionalities that elevate data presentation. Whether you're looking to highlight code snippets, track project status, or create visually engaging timelines, this overview will equip you with the knowledge to effectively utilize Confluence for your documentation needs. Prepare to unlock the full potential of your Confluence experience!

Confluence Macros



Macros help to enhance the functions and capabilities of your confluence page. There are about 30 macros in place. However, I have pinned a few of them that come in most handy to present technical information while working on projects.

	Macro	Description	Additional Notes
1	Code Snippets	Highlight Code Blocks.	Insert any macro by typing a slash bar “/ “ followed by the macro name on the cursor.
2	Status Label	Reporting Project Status	<div>COMPLETED</div> <div>Example</div>
3	Jira Issues	Link your Jira instance with your Confluence instance.	
4	Excerpt	Enables the user to reuse content across pages.	Type <code>/excerpt</code> on the cursor > Insert Excerpt Add excerpts to a page with the insert excerpt macro
5	Table Excerpt	Enables the user to reuse tabular content across pages.	type <code>/table excerpt include</code> > choose from options. <div>i Tip: Make sure you name the excerpt before publishing.</div>
6	Roadmap Planner	Allows users to create visual timelines and effectively present project progress.	You can also link pages to the bars on the planner. Roadmap Planner Macro
7	Chart	It helps to display data in a chart format.	Chart Macro
8	Change History	Displays a list of updates /changes on your page.	This can be useful to validate a set of changes and to view comments.
9	Widget Connector	Helps to embed videos, slideshows, etc	Widget Connector Macro
10	Page Index	Presents a list of the contents under your space in alphabetical order.	Insert the page index macro
11	Smart Button	Allows users to launch an automation rule with one click of the button.	Smart buttons for automation in Confluence

12	Create Database	Presents structured data including different content types like links, pages, people, etc.	Create and edit databases
13	Task report	Allows the user to display a task report including the number of tasks, assignees, due dates, statuses, etc.	It is great for meeting notes, status reports, or project planning pages. Task Report Macro

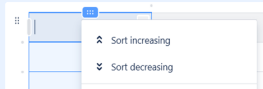
Tools Menu


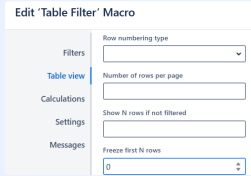
Additionally, it has Confluence-specific capabilities like Layouts, Tables, Insert Links, and more. A list of some of these features that are commonly utilized in documentation can be found below.

	Tools Menu	Description	Additional Notes
1	Code - Used for highlighting Code Variables	Three dot menu > More Formatting > Code	
2	Link Ctrl + K - To Insert Links	Link Ctrl + K > Search or paste a link > Display text > Insert	Tip: To make changes to the link - Click on the link >> Edit link
3	Bullet List	Select text > Tools Menu > Bullet list Select text > Tools Menu > Numbered list	
4	Action Item - To Create a Checklist	Select Text > Action Item	
5	Layouts	The  sign on the toolbar enables layouts which allows users to position elements and enhances the visual impact of the document.	Note: If you want to remove a layout, the section and all of its content will be removed. Tip: If you need to remove all layouts from a page, move all the content into one section, and set that section to be a single column. When you publish the page the layout will be removed.

Tables

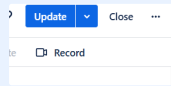
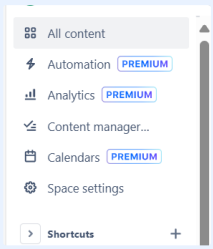
Adding tables may look comparable to other word processors like Microsoft Word. However, Confluence offers some advanced options that you may need to master in order to use them effectively.

	Tables	Description	Additional Notes
1	Table Icon - Insert Tables (Shift + Alt + T)	Grid on the tool Menu > Select the number of columns/rows.	Note: Use the dropdown on the tables to customize and add headers, colors, etc. Refer: Best practices for working with tables in Confluence
2	Add rows/columns.	Click on the + sign on the borders of the row/column to insert more rows/columns.	OR Click on the drop-down on the right-hand corner of the cell and select your choice.
3	Sort the Table	Click on the sort icon on the header of the table	
4	Resize Tables		Refer: Resize Confluence tables to any width!

5	Enable Table Macros	Click on the icon to enable it for tables on your page. Link to Download: Universal Plugin Manager	 <p>Note: It is an additional plugin that helps to filter tables.</p>
6	Sticky headers	Follow the instructions above & edit table macro > Table View > Freeze first N rows	 <p>Note: This does not work when the table is inside a layout on a page. (reported as a bug).</p>
7	Organize Content	Edit > Table View > Save	You can present numerical values in increasing/decreasing order or topics alphabetically.

Some General Features

Confluence has a number of features that facilitate documenting in several formats, collaborating with colleagues in different time zones, and creating engaging content in a matter of minutes. These are some general Confluence actions that enhance the usability of the platform.

	General Actions	Description	Additional Notes
1	Choose a Template	Top Navigation Bar > Templates	
2	Insert a Screenshot	Copy (Ctrl + C) & Paste (Ctrl + V)	Use the bar below the image to adjust Dimensions, outline, Alignments, and so on.
3	View previous versions of your document.	Click on the three-dot menu at the top right-hand corner of the page > Select Page History	
4	Export to PDF, XML, HTML, and Word.	Click on the three-dot menu at the top right-hand corner of the page > Select Export Option	
5	Export multiple documents.	Go to Confluence administration on the top right corner > Spaces (Select the space) Space Settings > General > Export Space > Export Formats (choose any 1) > Next.	

6	Export Space	Select Space Settings from the sidebar> Export Space > CSV > Next	The file will be saved in a zipped folder and do not unzip the folder if you want to import it to another space.
7	Import Space	Click on confluence administration on the top-right corner >Settings > Data Management > Import Spaces > Browse > Import	The export & import space options enable users to reuse, edit, and publish a space on other spaces.
8	Reorder contents	Space Settings > Content > Reorder	

Conclusion

Confluence is a comprehensive guide that enhances technical documentation processes through essential tools and features. Key findings include macros like Code Snippets, Status Labels, and Jira Issues for effective project tracking and content reuse. The tools menu offers intuitive formatting options, while advanced table functionalities help present data structurally. General actions like exporting documents streamline collaboration.

To maximize Confluence's benefits, users should explore macros, implement best practices, and leverage its capabilities for better project management and communication. Mastering these tools is crucial for productivity and clarity in documentation, especially in remote collaboration.

For further assistance, users can refer to the linked resources throughout the guide for detailed instructions and additional functionalities within Confluence.