

## Lab: Using Confluence Cloud and Jira Software Cloud together

Confluence and Jira are powerful tools on their own. Together, they transform the way that your team collaborates on projects, builds software, tracks key decisions, and more. There are many ways to integrate Confluence and Jira, and here's how you can get started.

### Integrate Confluence and Jira Software

Jira is great at helping your team plan and track project work. Adding Confluence gives you the power to organize all of the ideas, content, and files that you and your team create as you bring your vision to life.

When you link a Jira Software project to the Confluence space where all your project documentation lives, you eliminate the need for shared drives and file folders. Finding what you need has never been easier. Let's get down to business!

Open following URL in browser and after sign in you will see following screen:

<https://www.atlassian.com/software/jira/free>

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EACH PRODUCT ON A FREE PLAN:

- ✓ Supports up to 10 users or 3 agents
- ✓ Includes 2 GB of storage
- ✓ Offers Community support
- ✓ Is always free, no credit card needed

Larger team?  
[Compare plans](#)

YOU SELECTED

**Jira Software**  
Project and issue tracking

SELECT A SECOND PRODUCT


**Confluence**  
Document collaboration  
Add context to your projects with a single source of truth for product requirements, release notes, and documentation. [Select](#)

**Jira Service Management**  
High-velocity ITSM  
Empower Dev, IT Ops, and business teams to collaborate at high-velocity so they can respond to changes and deliver great service experiences. [Select](#)

[Next](#)

NO CREDIT CARD REQUIRED

Select **‘Confluence’** as second product by clicking **Select** button and click **Next**.




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Add context to your projects with a single source of truth for product requirements, release notes, and documentation.

Remove



**Jira Service Management**  
High-velocity ITSM


Empower Dev, IT Ops, and business teams to collaborate at high-velocity so they can respond to changes and deliver great service experiences.

Select


Next

NO CREDIT CARD REQUIRED





Next, you will need to create new site on Atlassian cloud as shown below:



Cloud Free



Trusted by over 65,000 teams worldwide



- ✓ Scale agile practices
- ✓ Consolidate workflows
- ✓ Expand visibility
- ✓ Plan, track, and release

Welcome back, Ernesto

Work email

[Sign in with a different Atlassian account](#)

Your site

.atlassian.net ✓

By clicking below, you agree to the [Atlassian Cloud Terms of Service](#) and [Privacy Policy](#).

Agree

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## One moment, your site is starting up

When you get in, explore all the products you've purchased.

Click the menu (☰) in the top left to switch between products.



### Jira Software

The #1 software development tool used by agile teams. Plan, track, and release world-class software

### Confluence

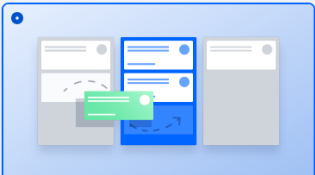
Organize your work, create documents, and discuss everything in one place



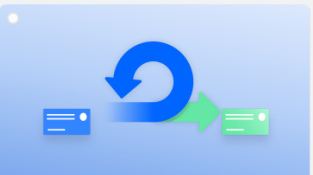
After site is ready, you will see following screen. Click **Next** to create new jira project.

### Select a template for your first project

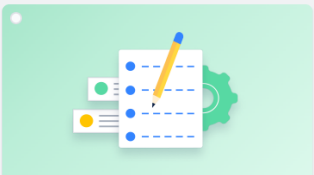
If you're not sure what to choose, don't worry. You can quickly create a new project if this one's not right for you.




**KANBAN**  
**A simple board to visualize your workflow**  
A flexible and efficient way to manage agile work, with a board and timeline.  
**POPULAR**




**SCRUM**  
**Deliver work in short, repeatable time blocks**  
Plan, prioritize, and schedule work using agile sprints with a backlog, board and timeline.



**BUSINESS**  
**Collaboration for business teams**  
Designed to help your business team collaborate and connect, with list and calendar views, forms, and more.





Next


## Create project

Explore what's possible when you collaborate with your team. Edit project details anytime in project settings.

\*Indicates a required field.

Name \*  
confluence-intro

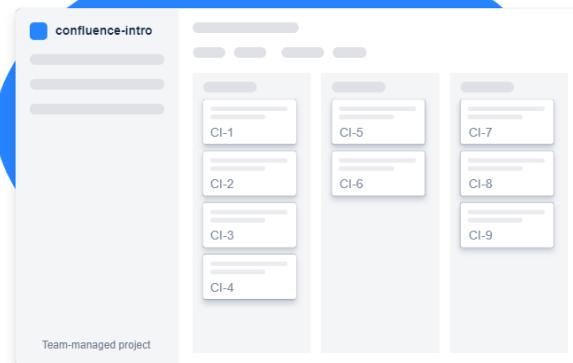
Template [More templates](#)



**Kanban**  
Jira Software  
Visualize and advance your project forward using issues on a powerful board.


[Show more](#)


[Back](#) [Create project](#)





← → ↻


fenagoconfluence-jira.atlassian.net/jira/software/projects/CI/boards/1


 Gmail


 YouTube


 DNS Management


 Maps


 Imported


 PDF to Markdown

 Is it possible to dire...

 WebApp-OpenIDC...

 Schedule | Ernesto ...

 Change listen port f...

 Jira Software

Your work ▾

**Projects ▾**


Filters ▾

Dashboards ▾

Teams ▾

Apps ▾

[Create](#)


 confluence-intro


Software project

You're on the Free plan

[UPGRADE](#)


PLANNING


 Timeline


 **Board**


[+ Add view](#)

DEVELOPMENT

 Code


 Project pages


 Add shortcut

 Project settings

Projects / confluence-intro

**CI board**

 EL


 Invite

TO DO

[+ Create issue](#)

IN PROGRESS

DONE ✓



In the next steps, we will connect confluence space with Jira.

## **Connect a Confluence space to a Jira project**

This is the first step to integrating Confluence and Jira.

1. Navigate to 'Project pages' in the Jira lefthand sidebar
2. Click 'Connect to Confluence'
3. Search for the Confluence space you want to connect

Great! You are now ready to view, create and edit pages from within Jira.

## **Add a Jira shortcut to a Confluence page**

Adding shortcuts will make it easy to switch between products when needed.

1. Copy the URL of your Jira project. Your jira project URL might be similar to this:

*[https://SITE\\_NAME.atlassian.net/jira/software/projects/BOARD\\_NAME/boards/BOARD\\_NUMBER](https://SITE_NAME.atlassian.net/jira/software/projects/BOARD_NAME/boards/BOARD_NUMBER)*

2. Navigate to the Confluence space you'd like to connect it to
3. Tap the Add shortcut option in the Confluence lefthand sidebar
4. Paste your Jira project URL in the Edit space shortcuts dialog box, and name your shortcut for easy reference

Now you can smoothly navigate to your Jira project by clicking on the shortcut in the left sidebar. Anyone can use shortcuts, but only site admins can create new shortcuts for a Confluence space.

## **Add a Confluence shortcut to a Jira project**

Admins are able to add a Confluence shortcut to a Jira project.

1. Navigate to the Confluence page you'd like to link to Jira—this is probably your space overview page
2. Copy the page URL by selecting share
3. In your Jira project of choice, select Add item in the left sidebar, and select shortcut

4. Paste the Confluence page URL and name your shortcut, just as you did in Confluence

Jump to the related Confluence space and back again in a snap. Once you've linked your Jira project and Confluence page, you'll see important Jira notifications, such as shares, mentions, and comments, in your Confluence notifications. You'll never miss an important Jira notification, even when you're deep in Confluence work.

## Use embedded Confluence pages in Jira

When your Jira project is connected to a Confluence space, you're able to view, edit, and create Confluence pages without ever having to leave the product. This eliminates context-switching by creating a more integrated experience within your Jira Project Pages.

Viewing pages is simple. Navigate to your Project Pages and select a page to have it open in an embedded window, without having to switch over to Confluence.

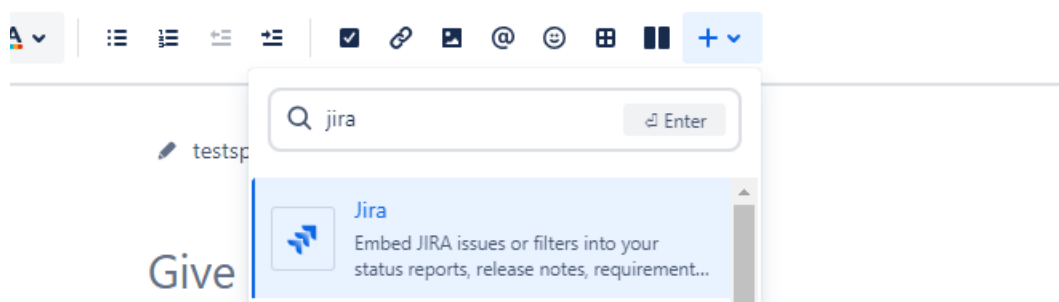
To add new content from your Project Pages section, you can create either from a blank Confluence page or via a Confluence template, all within Jira Software.

Editing Confluence pages can also be done inside Jira with embedded pages. Within your Project Pages section, simply hover over a page to reveal the pencil icon, then click to edit.

## Create Jira issues from Confluence

You can create a Jira issue or epic directly in Confluence. To create an issue:

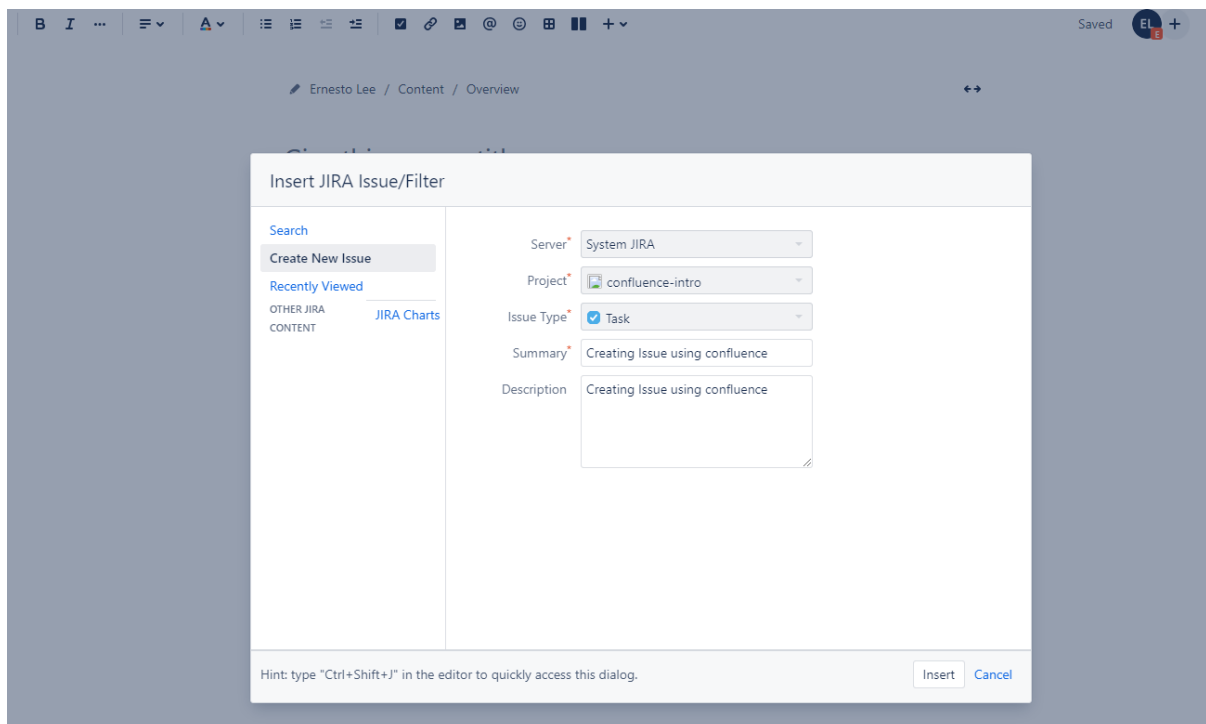
1. Tap **+** and Select **Jira** or Type `/jira` while editing a page.



2. Select **Create new issue** from the panel on the left
3. Fill in the issue details, then select **Insert**

The issue will automatically be added to your Confluence page and the Jira project you selected.

You can use the same functionality to create Jira issues from content in Confluence. When in view mode, you can highlight any text on a page and select “create issue” to create Jira issues directly.



## Add Jira issues to Confluence pages

Most people would rather not spend their time constantly jumping between applications. Luckily, the Jira and Confluence integration makes it easy to track Jira issues directly in Confluence. Whether you spend most of your day in Confluence or in Jira, you have the context and traceability you need, which means greater efficiency for your team, day in and day out.

## Track Jira issues directly in Confluence

Just paste your Jira link on a Confluence page and it will automatically drop a dynamic Jira issue link on your Confluence page. Once you publish the page, the link will display the issue ID and title, issue category (epic, task, etc.), and issue status in the workflow (to do, in progress, done, etc.).

On the Jira issue page, a link to the Confluence page will appear in the 'Confluence Pages' section.

## Display a dynamic list of Jira issues on a Confluence page

To display a list of Jira issues on a Confluence page:

1. Type `/jira` while editing a page or tap **+** and select **Jira**
2. Enter or search for Jira issues in the search bar

**Note:** Please make sure to create few issues first with different status. You can search using any valid key URL or JQL

- **project = "YOUR\_PROJECT\_KEY"**
- **status = "done"**

Insert JIRA Issue/Filter

Search

Create New Issue

Recently Viewed

OTHER JIRA CONTENT

JIRA Charts

Search

status = "done"

Search using any issue key, search URL, JIRA link, JQL, plain text or filter, e.g. filter = "My JIRA filter"

Key	Summary
CI-2	Creating Issue using confluence

Display options

Hint: type "Ctrl+Shift+J" in the editor to quickly access this dialog.

Insert Cancel

3. Select only the issues that you would like to display
4. (Optional) Select **Display options** to customize how they'll appear
5. Select Insert

When choosing which Jira issues you'd like to add to your page, you can choose to search for existing issues, create a new issue, or choose from recently viewed issues. The search function is very comprehensive – you can search by issue key, search URL, JIRA link, JQL, plain text, or a filter. Filters are a pro-move for saving time – create a new filter for a group of issues or even search saved filters from Jira.



From there, you can choose how you'd like to display the Jira issues on your page: list the Jira issues in a table, or simply display the count of issues that are associated with your search. The table that you create is dynamic and will update every time you refresh your Confluence page.

## Include your Jira roadmap in Confluence

You're able to add a Jira Roadmap macro (including a macro for advanced roadmaps) that allows you to embed a real-time roadmap into your Confluence page. This allows you to keep your team on the same page by sharing context for your planned work, providing status updates, and more. You'll be able to find everything in one place without having to switch apps or manually copy and paste content.

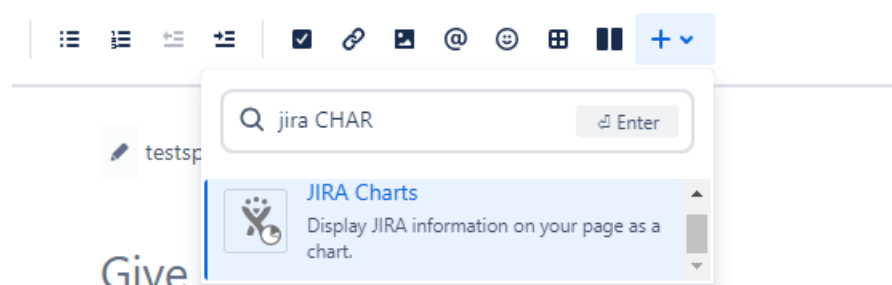
1. Type `/jira roadmap` while editing a page or tap **+** and select **Jira roadmap**
2. Paste a Jira instance URL, select your project and board, and select **Save**

## Create Jira Reports in Confluence Cloud

Capturing progress, results, and decisions is not always cut and dry. When lots of stakeholders and teams are involved, having good ways to share information is vital. The Jira Reports template makes it a snap to report on work happening in your Jira projects – share your progress on the current release, or a static change log that displays what's changed between your latest releases.

Start by creating a Confluence page and add the Jira Report. Select the project you'd like to report on, and the template automatically creates a preconfigured status report page. The report will automatically display pie charts based on your Jira project's fields such as priority, issue type, and more. You can customize your report by choosing different fields to report on.

- Tap **+** and Select **Jira Charts** while editing a page.



- Create different issue with different assignee and status

fenagoconfluence-jira.atlassian.net/jira/software/projects/CI/boards/1

Gmail YouTube DNS Management Maps Imported PDF to Markdown Is it possible to dire... WebApp-OpenDC... Schedule | Ernesto ~... Change listen port f...

Jira Software Your work Projects Filters Dashboards Teams Apps Create

confluence-intro  
Software project

You're on the Free plan  
UPGRADE

PLANNING  
Timeline  
Board  
+ Add view

DEVELOPMENT  
Code

Project pages  
Add shortcut  
Project settings

Projects / confluence-intro

### CI board

Search EL Invite

TO DO 1

test issue  
CI-1 EL  
+ Create issue

IN PROGRESS

DONE 1 ✓

Creating Issue using confluence  
CI-2 ✓

- Enter **project = "YOUR\_PROJECT\_KEY"** in the search field and click Preview.

### Insert JIRA Chart

Pie Chart

Created vs Resolved

Two Dimensional

OTHER JIRA CONTENT

JIRA Issue/Filter

Search

project = "CI"

Preview

Search using any issue key, search URL, JIRA link, JQL, plain text or filter, e.g. filter = "My JIRA filter"

Unassigned = 1

Ernesto Lee = 1

Display options

Insert Cancel

Select different charts shown in the left menu:

## Insert JIRA Chart

Pie Chart

Created vs Resolved

Two Dimensional

OTHER JIRA CONTENT

JIRA Issue/Filter

Search

Preview

Search using any issue key, search URL, JIRA link, JQL, plain text or filter, e.g. filter = "My JIRA filter"

Date	Red Line (Value)	Green Line (Value)
21-Sep	0	0
28-Sep	0	0
5-Oct	0	0
12-Oct	0	0
19-Oct	2	1

Display options

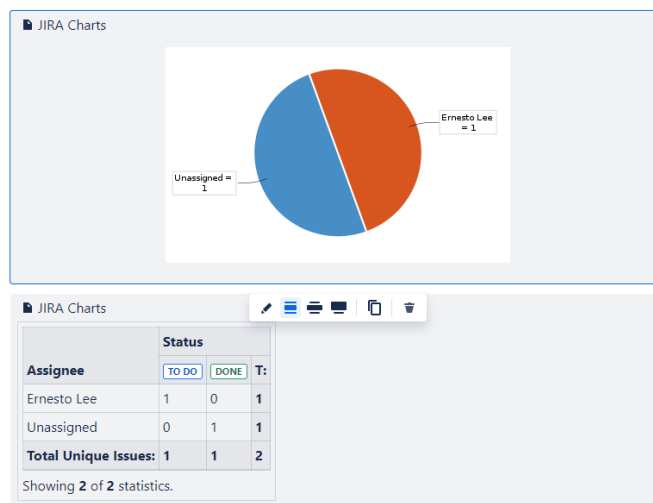
Insert

Cancel

Normal text ▾ | **B** *I* ... | ≡ ▾ | A ▾ |     |        + ▾

My first space / Content / My first space

## Jira Reports



Jira Reports give stakeholders a bird's eye view of your team's progress with just a few clicks. When you have improved visibility across all stakeholders, your team can focus more on the task at hand and complete work faster.