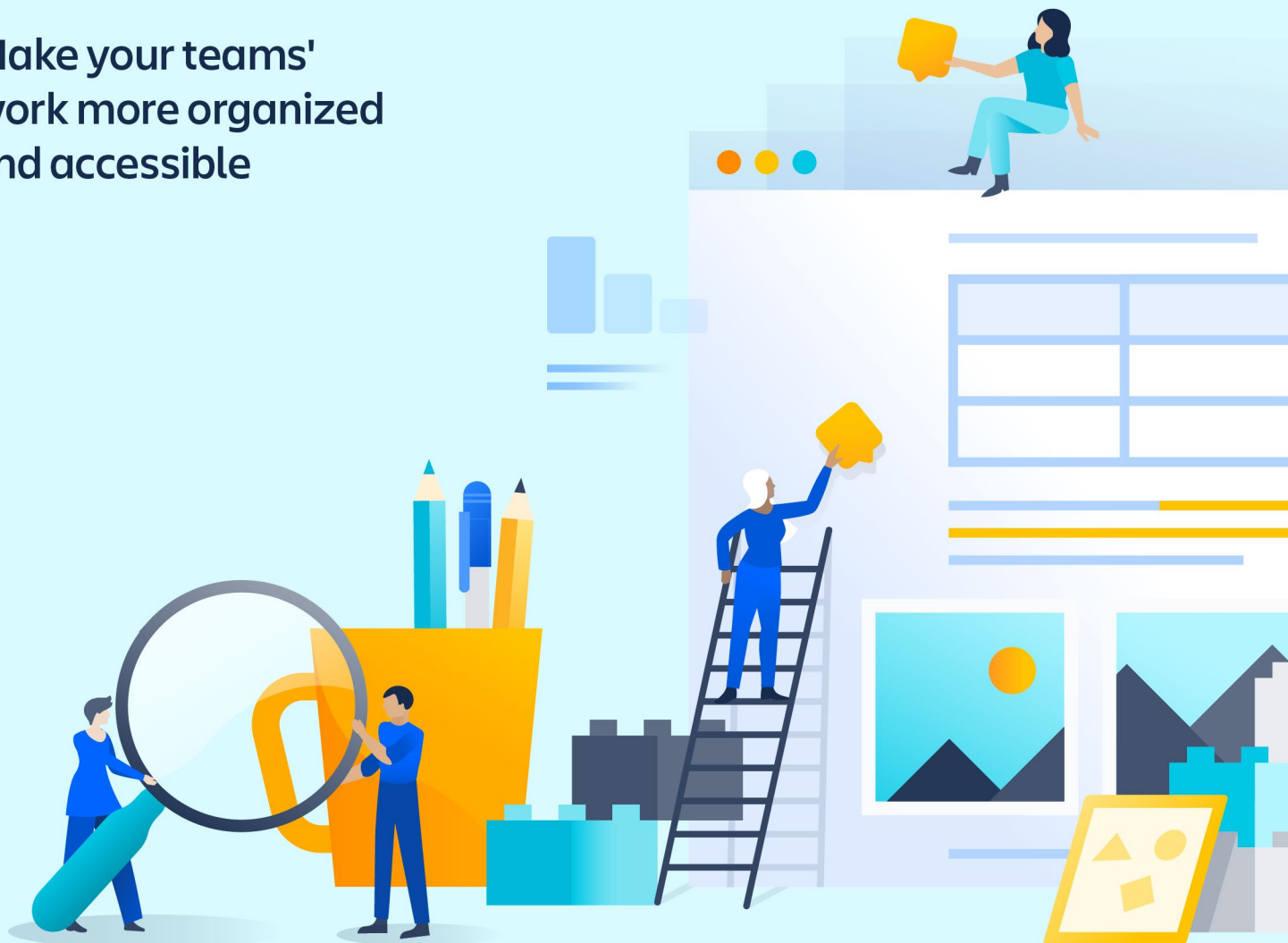


# Organizing Confluence: building a strategy

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Make your teams'  
work more organized  
and accessible



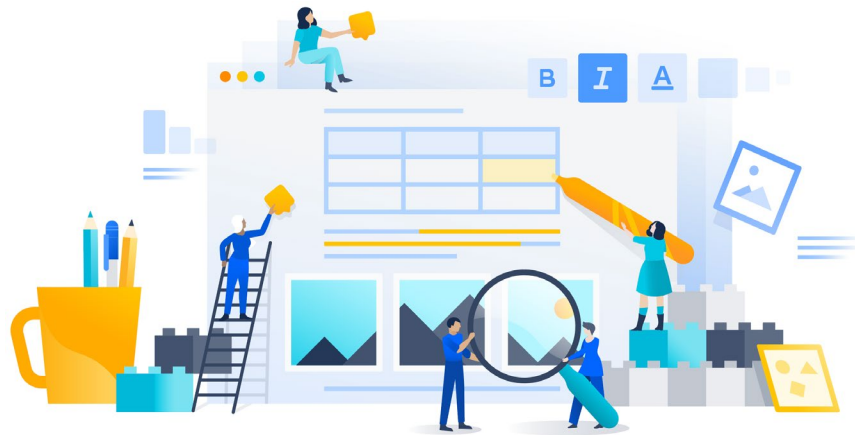
# Organizing Confluence: contents

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# What is information architecture?

Information architecture is the practice of organizing knowledge. Like building architecture, it involves designing and constructing an effective structure. For companies, creating an information architecture strategy allows users to better manage their information and find the right information when they need it.



## Who needs an information architecture strategy?

In short, everyone! Keeping knowledge organized and accessible helps organizations accomplish more together. Teams can discuss, gain alignment and make decisions faster. Without an information architecture strategy, knowledge can easily become disorganized, hard to use and outdated. This can be especially painful when your organization stores and shares knowledge in a tool like Confluence.

If your organization is already using Confluence, the way you organize (or don't organize!) knowledge in pages or spaces may be working for now. But as usage grows, having an information architecture strategy makes it easier for teams to collaborate on pages, share information, and onboard new employees to Confluence.

COMPARE

# INFORMATION ARCHITECTURE VS. ENTERPRISE CONTENT MANAGEMENT

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## ENTERPRISE CONTENT MANAGEMENT

Enterprise content management (ECM) solutions help digitally manage an organization's company's knowledge and information in order to support its business goals. The right ECM solution will help automate processes, increase productivity, and encourage teams across a business to work better together.

## INFORMATION ARCHITECTURE

Having an information architecture strategy is an important part of successfully implementing an enterprise content management solution. An effective information architecture strategy will ensure that knowledge is organized and accessible for an organization's company's users and teams.

# How to create an information architecture strategy for Confluence



The steps required to create an information architecture strategy for Confluence are similar to the steps required to create a new building or home. Before you can move in and enjoy your new space, you'll need to analyze what you're working with and design and build an ideal structure. This may seem like a daunting task, so we've broken down the process below:

## STEP ONE

### Perform a site analysis

Before breaking ground on construction, architects will tour a site to understand the land or existing structure that they'll be working with. During this time, they'll make note of the site's surroundings and details to consider like climate, views or access to utilities for consideration in their design.

Similarly, you'll want to perform an analysis on your Confluence instance. You'll want to evaluate:

- How much information is currently being stored in Confluence
- How much information is stored in pages versus attachments
- Where information lives within Confluence spaces
- Who owns the content in Confluence
- How much of the information in Confluence is still relevant to your organization today

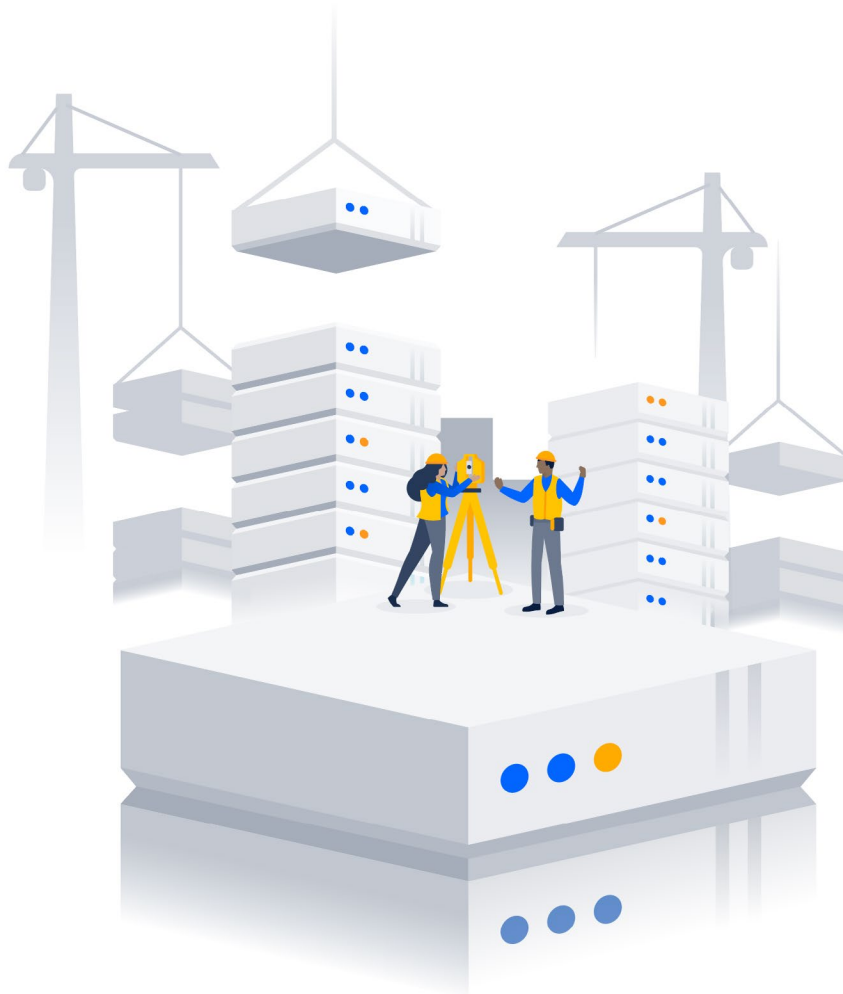
If you're starting out with a brand new Confluence instance, you may not have answers to all of these questions.

Depending on the size and complexity of your Confluence instance, this analysis could be relatively quick and straightforward or take your team a bit of time. It's important to take time to do this analysis properly, because it will inform your actions in the next step!

## STEP TWO

### Design your floor plan

Next, an architect will think about the building occupants' needs and design a highly functional floor plan that's suited for these needs. Similarly, once you have an understanding of your Confluence instance and your organization's needs, you can build a plan for organizing information.





#### ORGANIZING TIP

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Spaces and pages are great for organizing where your content lives, and **labels** make it easier to find your content once its organized! Labels are key words that you can add to spaces, pages and attachments to make them easier to group and find.

- Space labels: If you've got **lots of related spaces**, you can use labels to group them together into categories in the Space Directory.
- Page labels: If you've got **lots of related pages**, you can use labels to group them together. For example, you could assign the label accounting to all accounting-related pages. You can then browse all pages with that label in a single space or across the instance, display a list of pages with that label, or search based on the label.
- Attachment labels: If you've got **lots of related attachments**, you can use labels to group them together, too.

After speaking to many customers, we've learned that there are generally five levels of content in any Confluence instance:

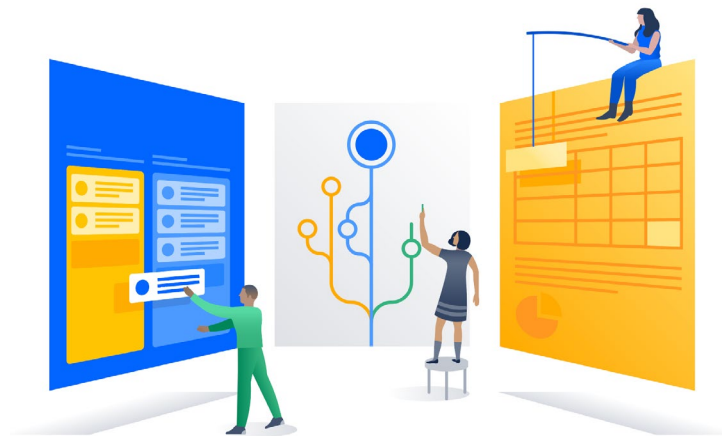
Content level	Where the content lives	Example
<b>Organization or company-level content</b>	A "Corporate" space for the entire organization	A "Corporate Comms" space for internal and external announcements, or an "Executives Corner" space for an organization's leadership team to share updates
<b>Department-level content</b>	A "Department" space for each department	A "People" space for all teams within the HR department's work, or a "Legal" space for all teams within the Legal department's work
<b>Team-level content</b>	A "Team" space for each team within a department  *Team spaces can be listed or linked to from their department's space's home page	An "SMB Sales" space for the team specifically focused on selling to SMB accounts, or a "Compliance" space for the Legal team focused on Compliance
<b>Project-level content</b>	New projects can have their own spaces, or you can keep project-related pages in a single page tree within a space	A space for "June Rocket Launch" can contain all pages related to this project, or a "June Rocket Launch" parent page can contain all project spaces within the "Rocket Team" space
<b>Personal content</b>	An individual user's personal space	Notes for a user's one-on-one meetings with their manager or peers may be kept within their personal space

Sound familiar? Your organization may have all of these types of content, or you may have a few. We suggest taking the framework above and applying it to the information in your Confluence instance in order to design your organization's ideal "floor plan" or structure.



When thinking about building or re-building the structure of your organization's information in Confluence, you'll want to remember that a strong foundation provides a building with structural integrity. You'll want to take a long-term view on information and team growth when thinking about how you want to organize information.

Once you've come up with a basic structure for information, you'll want to socialize your plan with key stakeholders and get their buy-in before implementing any changes.

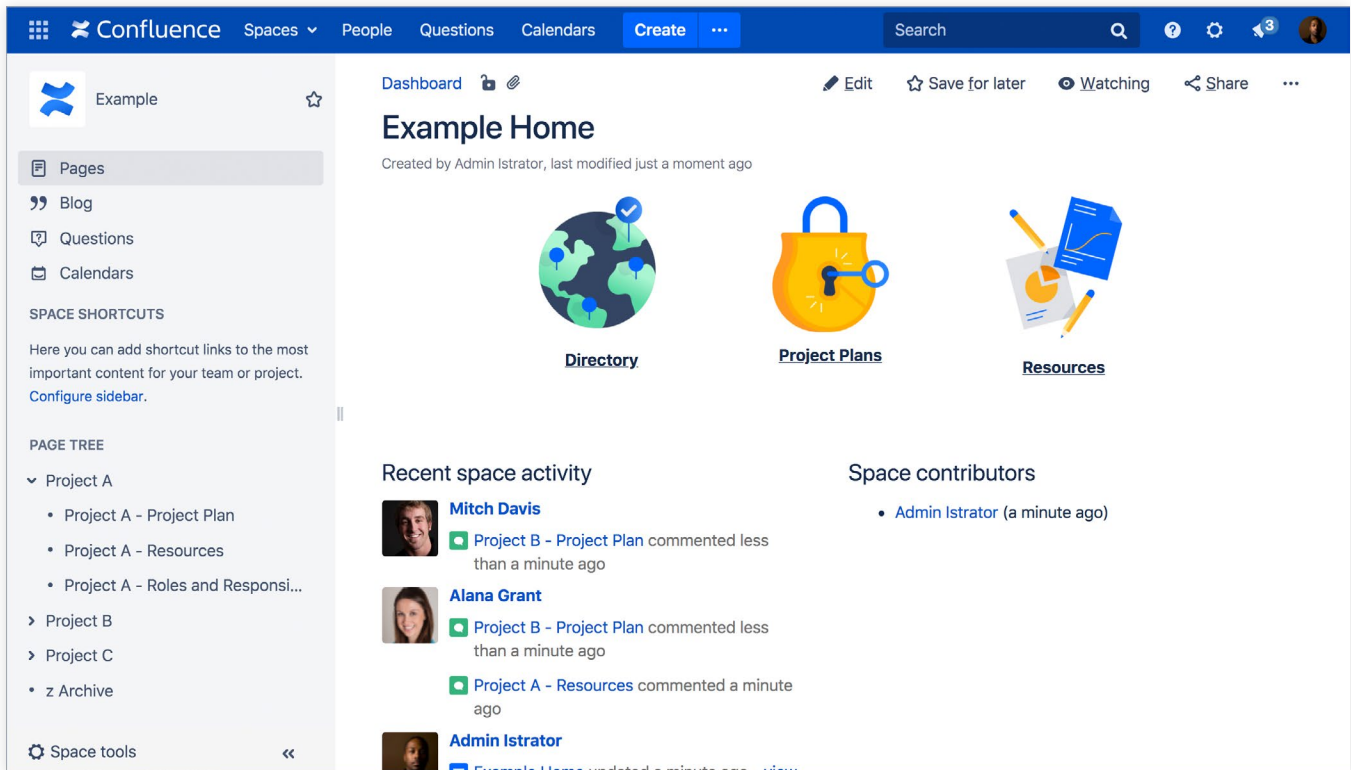


### STEP THREE

## Constructing your building

After a floor plan has been finalized, an architect will hand off execution and construction to a builder. The builder will follow the floor plan's specifications to lay the foundation, put up walls and complete all details needed to finish the building. During this process, the architect and builder will continue to consistently communicate to ensure they're both on the same page.

Likewise, in Confluence, you will want to enlist your team or stakeholders to help you execute on your plan. For some companies, this means handing off execution entirely to a centralized IT team. For others, this means the team responsible for administering Confluence provides a template or guidelines for other teams to follow when re-organizing their spaces. Whichever option you choose, make sure to align on a timeline for delivery and touch points to check in on progress.



How do you ensure a smooth handoff between planning and execution of your information architecture strategy in Confluence? Once you've decided on guidelines for your spaces, you can create an example for others to use! Start by clearly naming the space and selecting an easy-to-remember space key – for example, “SAMPLE” or “EXAMPLE”. Then, populate the space with a space home page and parent/child pages organized into page trees, so others in your company will understand how to organize their spaces.

## STEP FOUR

### Moving in

When building is completed, the architect and builder will hand over the keys to the occupants so they can move in! In the same way, once your Confluence instance has been organized the way you want it, you can allow your users to move in.

If you had existing information in Confluence, this means your teams will spend time moving their pages. They may create new page trees within a space and move their pages in as child pages, or they might even create new spaces. While it may seem time consuming, this is an important step in getting your existing information organized, so the information your teams create in Confluence in the future has a place to live.

The screenshot shows the Confluence interface for the 'IT Support' space. The top navigation bar includes 'Confluence', 'Spaces', 'People', 'Questions', 'Calendars', 'Create', and a search bar. The left sidebar contains a 'PAGE TREE' with the following structure:

- ITIL Process Guides
- Knowledge Central
  - Troubleshooting articles
    - AnyConnect VPN client confi...
    - HTTP 502: Bad Gateway error
    - KE - web-store purchasing is...
    - Resolving Connection Issues...
    - Wifi connectivity issues - tro...
  - How-to articles
- Service Catalog

The main content area displays the 'IT Central' page, created by Admin Istrator. It features a search bar with the text 'Search for a solution'. Below the search bar, there are three columns of content:

- Help Desk Team**: Profile of Mitch Davis, IT Support Team Lead.
- Frequently asked questions**:
  - What accounts do I need to setup for new employees?
  - New employee on-boarding checklist
  - How do we request new mobile devices?
  - IT Mobile device policy (BYOD)
- Other resources**:
  - Facilities Support
  - HR Services
  - Manufacturing Systems support

At the bottom of the page, there are three sections: 'Browse by topic', 'Recently updated articles', and 'Incident Response'.

In this example, notice that this team has decided to organize pages in their “IT Support” space under three parent pages “ITIL Process Guides”, “Knowledge Central” and “Service Catalog”. If we expand “Knowledge Central”, we see that the child pages have been organized into “Troubleshooting articles” and “How-to articles”.

### PRO TIP

Once you’ve moved pages to the right spaces, if you need to retroactively apply labels to pages there are plenty of [Atlassian Marketplace](#) apps and [macros](#) that can help you do this quickly and effectively in bulk!

## STEP FIVE

### Decorating and ongoing maintenance

Once occupants have moved into a building, it's up to them to decorate and maintain it. Preventative maintenance helps keep a building in top shape, avoid breakdowns and minimize repair costs. In Confluence, you and your organization will want to maintain your information architecture strategy by following some of these best practices:

#### Put out the welcome mat with a structured onboarding

Providing a structured onboarding to Confluence when new employees join the company can help new hires understand how the tool is used at your organization. You can do this by introducing Confluence during orientation, sharing useful getting started pages and creating a page for each new hires' onboarding plan. A few tips for doing this successfully:

##### Introduce Confluence during orientation

- Before new hires have laptops, you can show them Confluence content as part of their orientation. For example, you can show them the page where they can find HR policies about taking holiday or sick leave.
- Explain how Confluence is used in your organization by showing pages or screenshots of pages.

##### Share useful getting started pages

- If you track information like corporate HR, finance or legal policies in Confluence, share them with your new hires and ask them to bookmark these pages in their browser.

##### Create a page for each new hires' onboarding plan

- If you're a hiring manager, before your new hire starts, you can create their onboarding plan on a page. This page can include tasks like learning about the team they're

working on and meeting up with individual team members, or it can have links to helpful information they'll need to read to get up to speed about your team's work. browser.

## Clean on a regular basis

Routine clean ups of the information stored in your Confluence instance will help keep content up-to-date and make it easier for you and your users to find the right pages when you need them. There are a few different ways to take care of outdated information in Confluence:

- Adding a flag to the page title or top of the page: On an outdated page, you can change the page title to include something to easily indicate its status, like "Page Title - Outdated" or "Page Title - Last updated in 2015". You can also add a warning message at the top of the page to indicate that the contents are no longer up-to-date, and direct readers to an updated page instead.
- Creating a page tree: You can create a page within your Space and move outdated pages under it, creating a page tree for outdated content. For easy reference, you can name the page's parent page "z Archive", "Space Name - Archive" or "Space Name - Old - Do not use". This makes it easy for those navigating the space to understand that the content is outdated, but may not make it immediately clear to someone on one of these pages that the content is outdated.
- Use the Space Archive feature: Outdated pages can be moved to a separate space, and this [space can be archived](#). Archived spaces are less visible (eg. hidden from search results), but remain in your Confluence index and are still available in Confluence. Archiving a space is easy to undo – you can make a space current again at any time.

## Tend to your spaces by assigning a 'gardener'

Keep spaces organized by assigning a 'gardener' to each space. By designating a person to have this responsibility, managing your Confluence content becomes a lot easier. You can even have multiple wiki gardeners - like one per team or one per space to split the work. Your 'gardener' should check that all pages are in the right page trees and spaces, and ensure that outdated content is archived or removed. We suggest doing this quarterly, as the seasons change! Taking small amounts of time on a regular basis will save more time in the long run, when maintaining your Confluence instance's information architecture strategy.

Your ‘gardener’ can schedule regular recurring clean up sessions for your users to tackle their own pages, or explore using a Marketplace app to automate this process. It’s also important to note that gardeners don’t have to be your Jira or Confluence admin, and it doesn’t have to be a full time role. ‘Gardeners’ aren’t necessarily the team members who will be moving pages around and re-organizing a space, rather, they should be responsible for auditing a space and can provide recommendations team members to help organize their content.

## Label important items

Labels are key words that can be added to [pages](#), [attachments](#) and [spaces](#) to make them easier to group and find. Use labels to group relevant content so your teammates can search, based on label, in Confluence. You can use multiple labels on a page, attachment or space to make them easier to find later. You can also use macros to display what you’ve labeled in Confluence in a number of ways. For example, you could label all pages relevant to the marketing team with marketing, and then add more specific labels like online, mobile, and physical to different pages where required.

In this example, we’ve labeled this page with “office-policies” and “how-to-articles”, so users can easily find them later.

The screenshot shows a Confluence page interface. At the top, there's a navigation bar with 'Confluence' and various tabs like 'Spaces', 'People', 'Questions', 'Calendars', 'Create', and 'Search'. On the left, a sidebar menu lists 'Pages', 'Blog', 'Questions', 'Calendars', 'SPACE SHORTCUTS', and 'PAGE TREE'. Under 'PAGE TREE', there's a list of items including 'Facilities Projects' and 'How-to articles'. The main content area has a blue header with the text 'Go forth and build with BARK and balance!'. Below this, there's a callout box with the text 'This policy is reviewed on an annual basis and is subject to approval based on lease agreements.' Underneath, there's a 'Related articles' section with a list of links: 'Security Card review and approval process', 'Corporate Apartment Policy', 'Office community bikes', 'Ergonomic desk assessment', and 'Internal: Security Card policy & guidelines'. At the bottom, there's a 'Like' button and a 'Write a comment...' input field. Two labels, 'office-policies' and 'how-to-articles', are visible at the bottom right of the page.

## Decorate your space home pages

Space home pages are likely the first page your teammates will see, yet they're often the most neglected. "Decorating" your space home pages will make your spaces easier to navigate. This page will set the context of the space, the scope of the space, identifies who is responsible, and provides an easy way to surface the most useful information. Great home pages save time by helping your teammates find the content they need and find where new content belongs.

The 5 key ingredients to a great space home page are:

- The basics of the team or project (e.g. your Why, How and What)
- The space owner name and team
- Quick links to the most useful content
- A picture or logo to make the space unique and memorable
- The project status or [team health monitor](#)

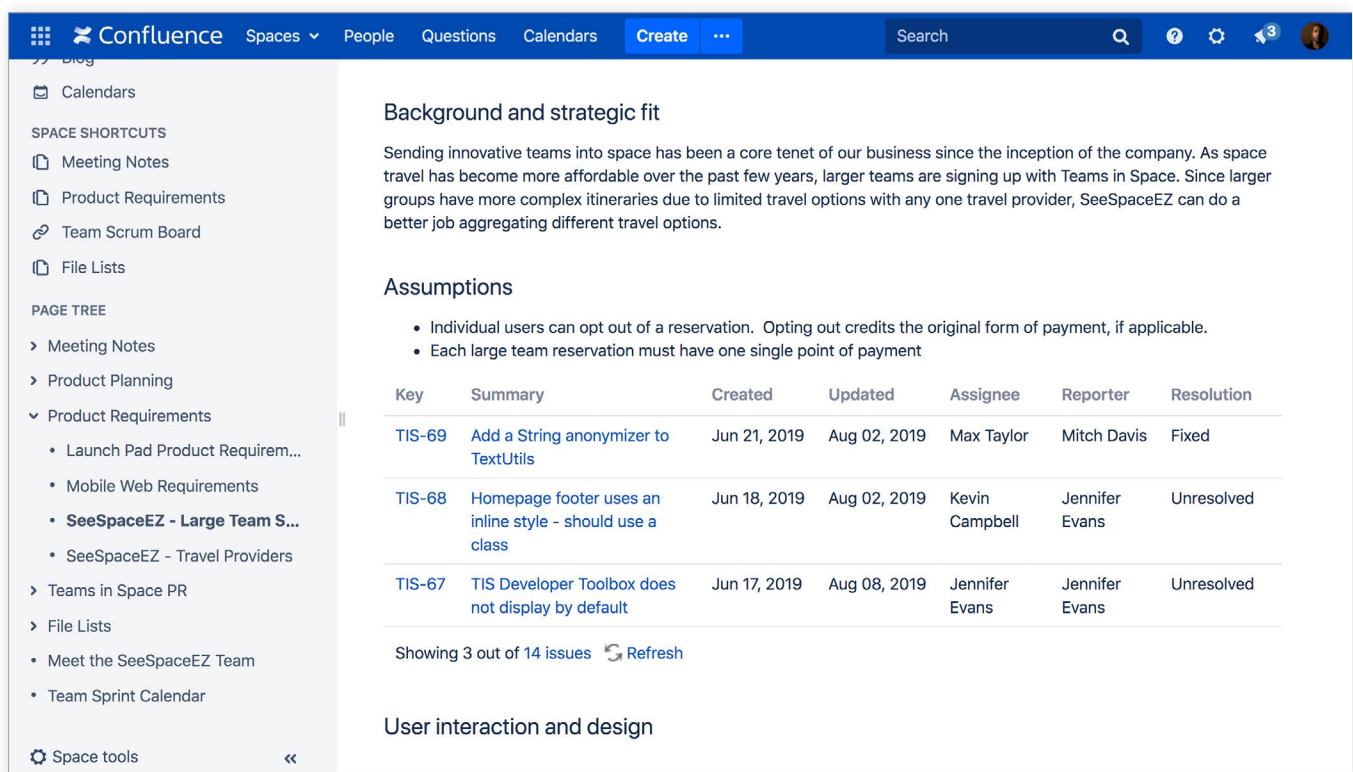
The screenshot shows a Confluence space home page for 'Infrastructure Change Management'. The page is well-organized and includes the following elements:

- Header:** Confluence navigation bar with 'Spaces', 'People', 'Questions', 'Calendars', 'Create', and 'Search' options.
- Left Sidebar:** Navigation menu for 'Infrastructure Change Management' with sections for 'Pages', 'Blog', 'Questions', 'Calendars', 'SPACE SHORTCUTS' (How-to articles, Decision log), and 'PAGE TREE' (Practices, How-to articles, Decision log, Release planning, Normal RFC planning, Major Change Post Implementati...).
- Main Content Area:**
  - Dashboard:** 'Infrastructure Change Management' title, created by Mitch Davis, last modified by Admin Istrator just a moment ago.
  - What is the Change Management Team?:** A text block explaining the team's role in implementing infrastructure changes, with a link to find out more.
  - Team Projects:** A section with a green plant icon and a link to 'Click here for Active Projects', and a rocket icon with a link to 'Click here for Shipped Projects'.
  - Status:** A green badge indicating 'ALL PROJECTS ON TRACK'.
  - Meet the Team:** Profiles for Alana Grant (@agrant), Change Team Lead, and Max Taylor (@mtaylor), Infrastructure Change Engineer.
  - Interactions:** A 'Like' button (Be the first to like this) and a 'Write a comment...' input field.

Here's an example of a great space home page with all of these ingredients.

## Adding functionality with macros

**Macros** help expand the capabilities of your Confluence pages, allowing you to add extra functionality or include dynamic content. By experimenting with macros, you can create more relevant and interesting content. Adding macros to your pages is similar to making your home a smart home with various connected devices, like smart speakers or a wifi-enabled thermostat. Macros can help you avoid content duplication across pages ([Excerpt](#) and [Excerpt Include](#)), list files attached to a page ([Attachments](#)) or embed content like YouTube videos ([Widget Connector](#)).



The screenshot shows a Confluence page with a sidebar on the left and a main content area on the right. The sidebar contains navigation elements like 'Calendars', 'SPACE SHORTCUTS', and 'PAGE TREE'. The main content area has a blue header with 'Confluence' and navigation tabs. Below the header, there's a section titled 'Background and strategic fit' with a paragraph of text. This is followed by an 'Assumptions' section with a bulleted list. The central part of the page features a 'Jira Issues' macro displaying a table of issues. The table has columns for 'Key', 'Summary', 'Created', 'Updated', 'Assignee', 'Reporter', and 'Resolution'. Below the table, it says 'Showing 3 out of 14 issues' with a 'Refresh' button. The page ends with a section titled 'User interaction and design'.

Key	Summary	Created	Updated	Assignee	Reporter	Resolution
TIS-69	Add a String anonymizer to TextUtils	Jun 21, 2019	Aug 02, 2019	Max Taylor	Mitch Davis	Fixed
TIS-68	Homepage footer uses an inline style - should use a class	Jun 18, 2019	Aug 02, 2019	Kevin Campbell	Jennifer Evans	Unresolved
TIS-67	TIS Developer Toolbox does not display by default	Jun 17, 2019	Aug 08, 2019	Jennifer Evans	Jennifer Evans	Unresolved

On this page, we've used the [Jira Issues macro](#) to provide a list of Jira issues on our page, based on a specific search.

## Save time with templates

**Templates** are Confluence pages with predefined content. They are a great way for you and your teams to easily create content in the format or layout that you want it in. Templates can also help easily onboard new teams into Confluence, and by showing team members how to create simple templates, they'll rely



less on IT and admins and become more self-sufficient and confident using Confluence on their own.

Templates are beneficial because they save time by allowing teams to duplicate layouts easily, and they ensure consistent formatting and organization of information. Assuming you're using the same template across projects and teams, this consistency means you'll be able to locate information easily, know what to expect, and it will help standardize processes to make teams more efficient. Not only do templates ensure the right information is on the page, they also help you present your content in a clear and concise way, too. Going one step further, you can even use the [Create from Template](#) macro to add a button so team members can directly create a page based on a given templates.

## Additional resources

- [Confluence Data Center Guide for Success](#)
- [5 pro-tips to get the most out of Confluence Webinar](#)
- [Secrets to Streamlining your Collaboration Tools Webinar](#)
- [Tips for Organizing Spaces](#)

### 🔍 Want to dig deeper ?

[atlassian.com/enterprise/data-center/confluence](https://atlassian.com/enterprise/data-center/confluence)

### 🔗 Have questions?

Contact us at [sales@atlassian.com](mailto:sales@atlassian.com)

