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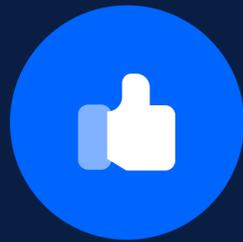
# Discover the power of automation for Confluence



**SHEERINE BAUCUM | PRODUCT MANAGER**

**STOP WASTING TIME AND  
ENERGY ON REPETITIVE  
TASKS TO MANAGE  
DOCUMENTS AND PROJECTS**

# Agenda



**Intro to  
automation**



**Top use  
cases**



**Rule  
building**

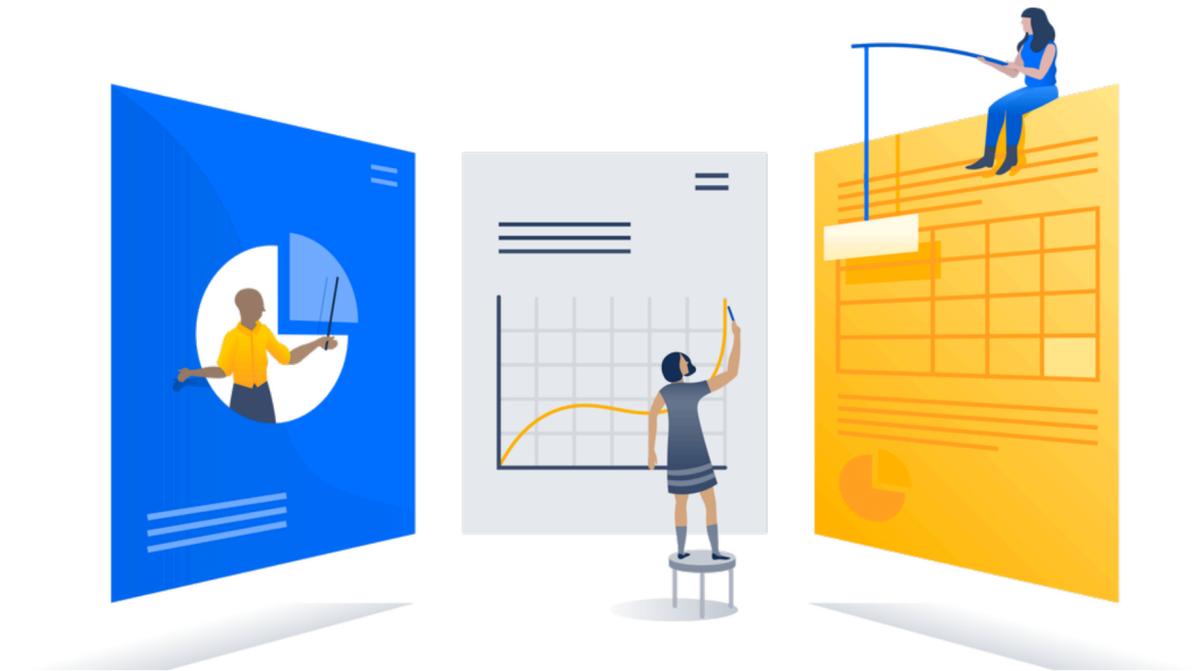


**Tips & best  
practices**

## AUTOMATION FOR CONFLUENCE

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Confluence enables teams to build, organize, and collaborate on work in a single place, from anywhere.



# Decreased productivity

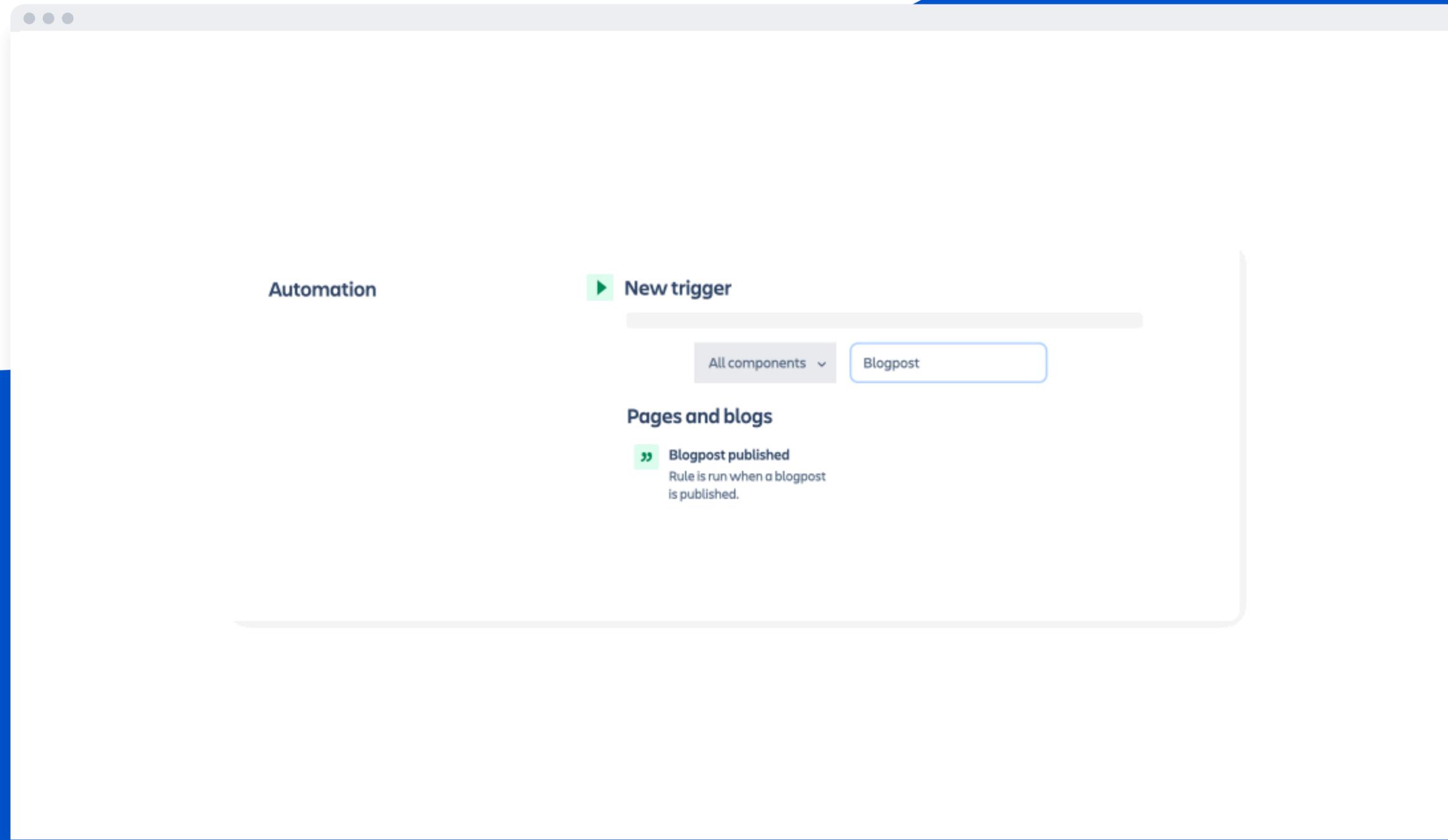
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For content owners,  
collaborators, and  
consumers



GET TO KNOW

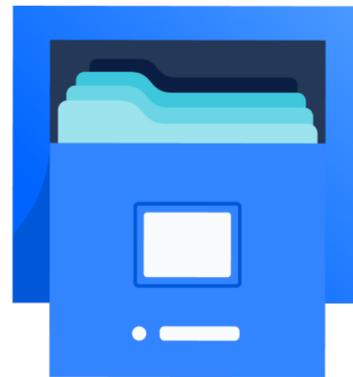
# Automation for Confluence



# Top use cases



**Workflows**



**Organization**



**Reminders**



**Setup**

Use cases

Workflows

Organization

Reminders

Setup

# Manage the content lifecycle

The screenshot shows a workflow configuration interface. At the top, there is a navigation bar with a 'Back to library' button, a toggle switch for 'Notify people when the status of a page changes' (which is currently turned on), and a 'Turn it on' button. Below this, the main configuration area is titled 'Content Ready for Review'. It includes a 'Rule details' section with the actor 'Sheerine Baucum'. The workflow is defined by a 'When' trigger 'Page status changed' and a 'Then' action 'Send Slack message'. The Slack message content is 'Hi team. The status of the following page changed to {{page.status}}: {{page.url}}'. At the bottom of the configuration, there is an 'Add component' option. On the right side, there is a configuration panel for the 'Page status changed' trigger, showing 'Status changed to' with a dropdown menu set to 'Ready for review'. 'Cancel' and 'Save' buttons are located at the bottom right of this panel.

# Use cases



Workflows

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Setup

# Keep spaces tidy and relevant

The screenshot shows a workflow configuration interface. At the top, there is a navigation bar with a "Back to library" button, a toggle for "Archive inactive pages when scheduled (recurring)", and a "Turn it on" button. The main area is divided into two panels. The left panel, titled "Archive Outdated Pages", contains a vertical list of components: "Rule details" (Actor: Sheerine Baucum), "When: Scheduled" (First day of the month at 9:00 AM), "Branch rule / for each page" (highlighted), "Then: Archive page", and two "Add component" options. The right panel, titled "Branch rule / for each page", provides configuration options for the selected rule. It includes a "Where" dropdown set to "Last updated more than", a numeric input field with "6", and a "months ago" dropdown. Below these is an "Add more criteria +" link. At the bottom right of the right panel are "Cancel" and "Save" buttons.

# Use cases

Workflows

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# Keep work on track

The screenshot shows a workflow configuration interface. At the top, there is a navigation bar with a 'Back to library' button, a toggle switch for 'Remind teammates about incomplete tasks when scheduled (recurring)', and a 'Turn it on' button. The main content area is divided into two panels. The left panel, titled 'Task Approaching Due Date', contains a 'Rule details' section with the actor 'Sheerine Baucum', a 'When: Scheduled every 7 Days' trigger, a 'Branch rule / for each task' component, and a 'Then: Send email' action with the message body '{{task.assignee.emailAddress}} You have an incomplete task'. Below the action are two 'Add component' options. The right panel, titled 'Branch rule / for each task', shows the configuration for the branch rule. It includes a 'Where' condition set to 'Incomplete', an 'And' connector, and a 'Due date is coming up in' condition set to '2 days'. There is an 'Add more criteria +' link below the conditions. At the bottom right, there are 'Cancel' and 'Save' buttons.

# Use cases

Workflows

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# Standardize team spaces

The screenshot shows a workflow configuration interface. At the top, there is a navigation bar with a 'Back to library' button, a toggle switch for 'Publish the same set of pages when a new space is created', and a 'Turn it on' button. The main area is divided into two columns. The left column shows the workflow steps: 'Rule details' (Actor: Sheerine Baucum), 'When: Space created' (Rule is run when a new space is created), 'If: User condition' (User who triggered the event is in group "Engineering"), and 'Then: Publish new page' (Template page: "{{now.shortDate}} Template page"). The right column shows the configuration for the 'Publish new page' step, including 'Space' (Same space as trigger), 'Parent page' (None), 'Enter page title' ({{now.shortDate}} Team Retro), and 'Template Space' (Mobile App Te...) and 'Template' (Retrospective). 'Cancel' and 'Save' buttons are at the bottom right.



Mobile App Team

Overview

Blog +

Whiteboards ALPHA +

Analytics

Calendars

Space Settings

Bulk Archive

SHORTCUTS +

Pages ... +

• Mobile App Project P...

Archived pages

# Mobile App Team

Share ... Unstar this space

## Welcome to your team space!

Here are a few suggestions to get started:

- Explain how your team should use this space by selecting the Edit button and customizing this Overview page
- Select **Create** to make a new page in your space
- Add links to tools, guides, and other team resources
- Bookmark our [guide](#) to learn how to build Confluence spaces for any team
- Explore the sample pages we've created for you

[Team homepage](#) ARCHIVED [Weekly meeting notes](#) ARCHIVED [Brainstorming](#) ARCHIVED

Remove this panel once you're ready to share your space with team members.

Team | Overview | Team news | Recently updated

Search for a page

### Team

Type `/USERPROFILE` or @ mention people to add your team.

### Overview

Introduce your team and describe your team goals and objectives.

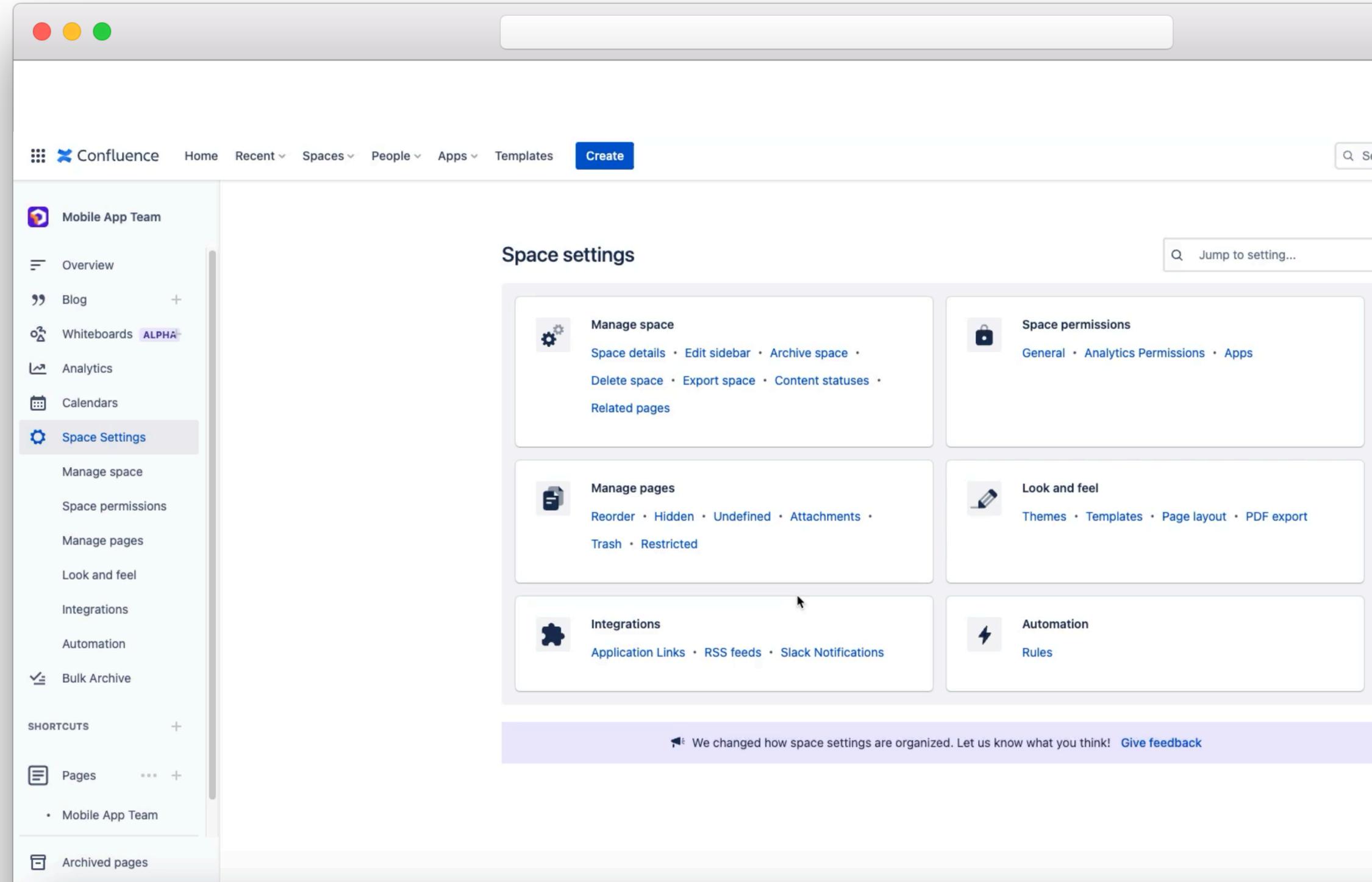
# LET'S BUILD!

## From template

Not sure where to begin? Use our templates!

## From scratch

Want to customize rules to meet your needs? Create rules from scratch!

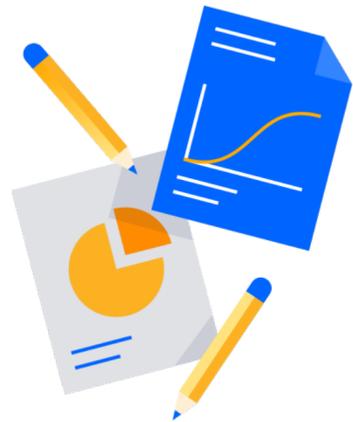


# Tips & best practices for rule building



## **CQL & smart values can be powerful**

Use proper syntax when creating rules with CQL and smart values. Share your findings with the community!



## **Make page titles unique**

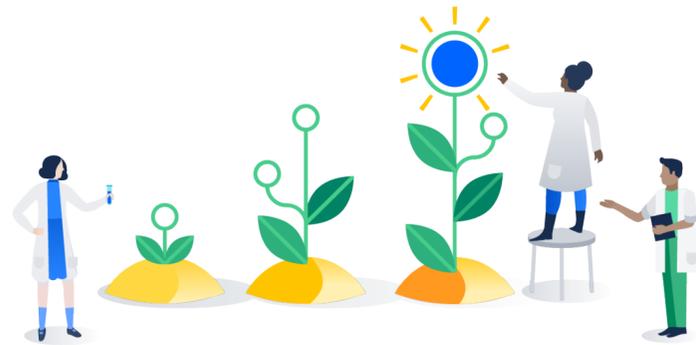
Use smart values, like current date, when setting up recurring meeting notes and pages.



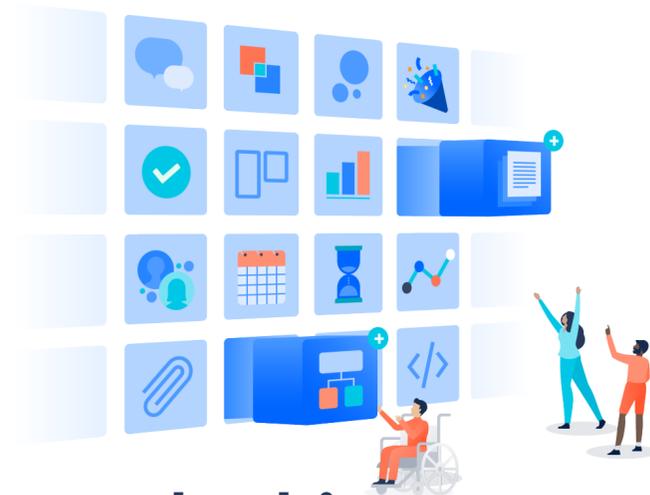
## **Test your rule**

Manually run rules after publishing. This can also be done in your sandbox!

# Advancing automation for Confluence



**Experience  
improvements**



**Unlocking new  
triggers & actions**



**Template library  
enhancements**



Thank you



**SHEERINE BAUCUM | PRODUCT MANAGER**