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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**



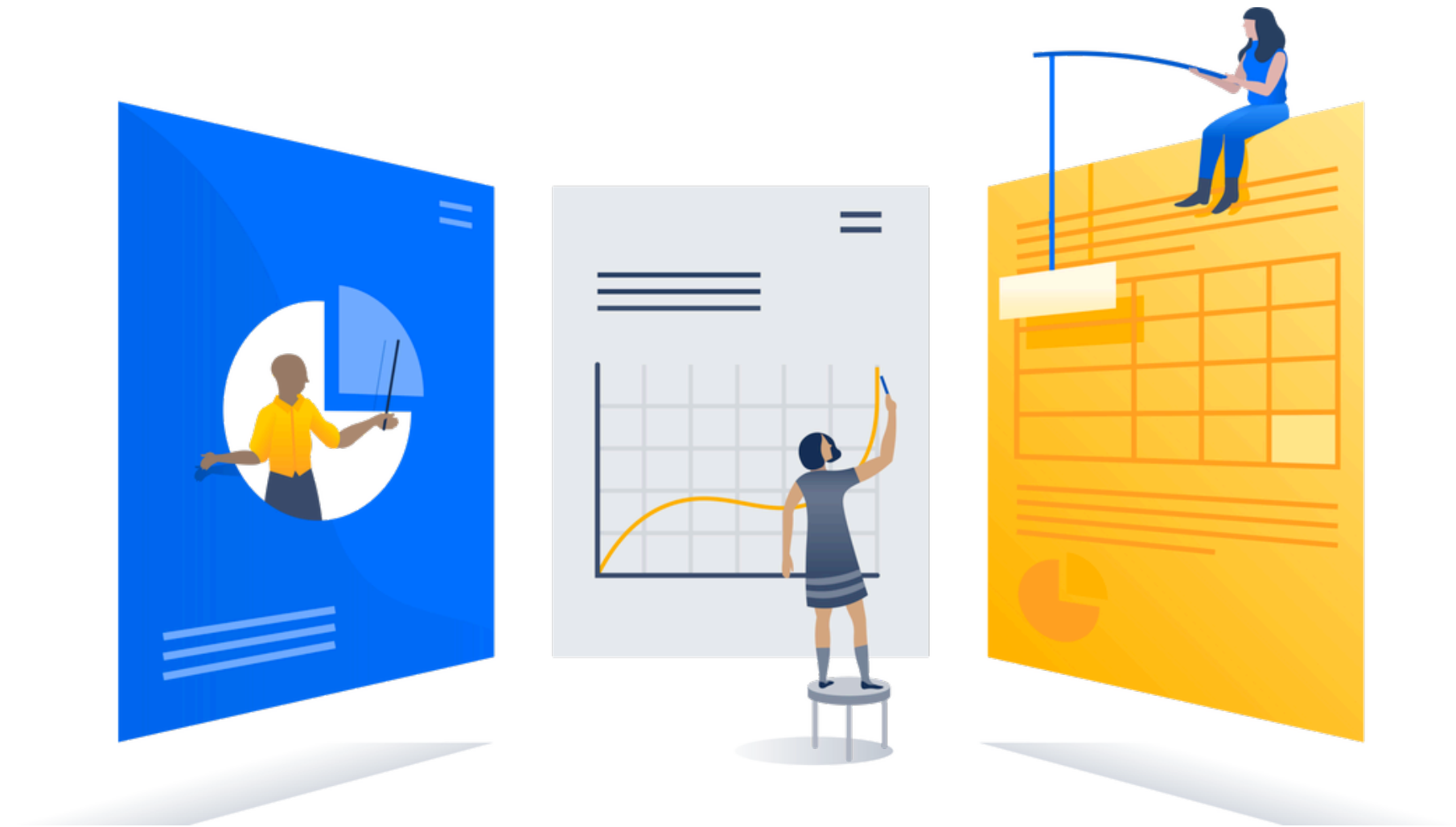
**Rule
building**



**Tips & best
practices**

AUTOMATION FOR CONFLUENCE

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



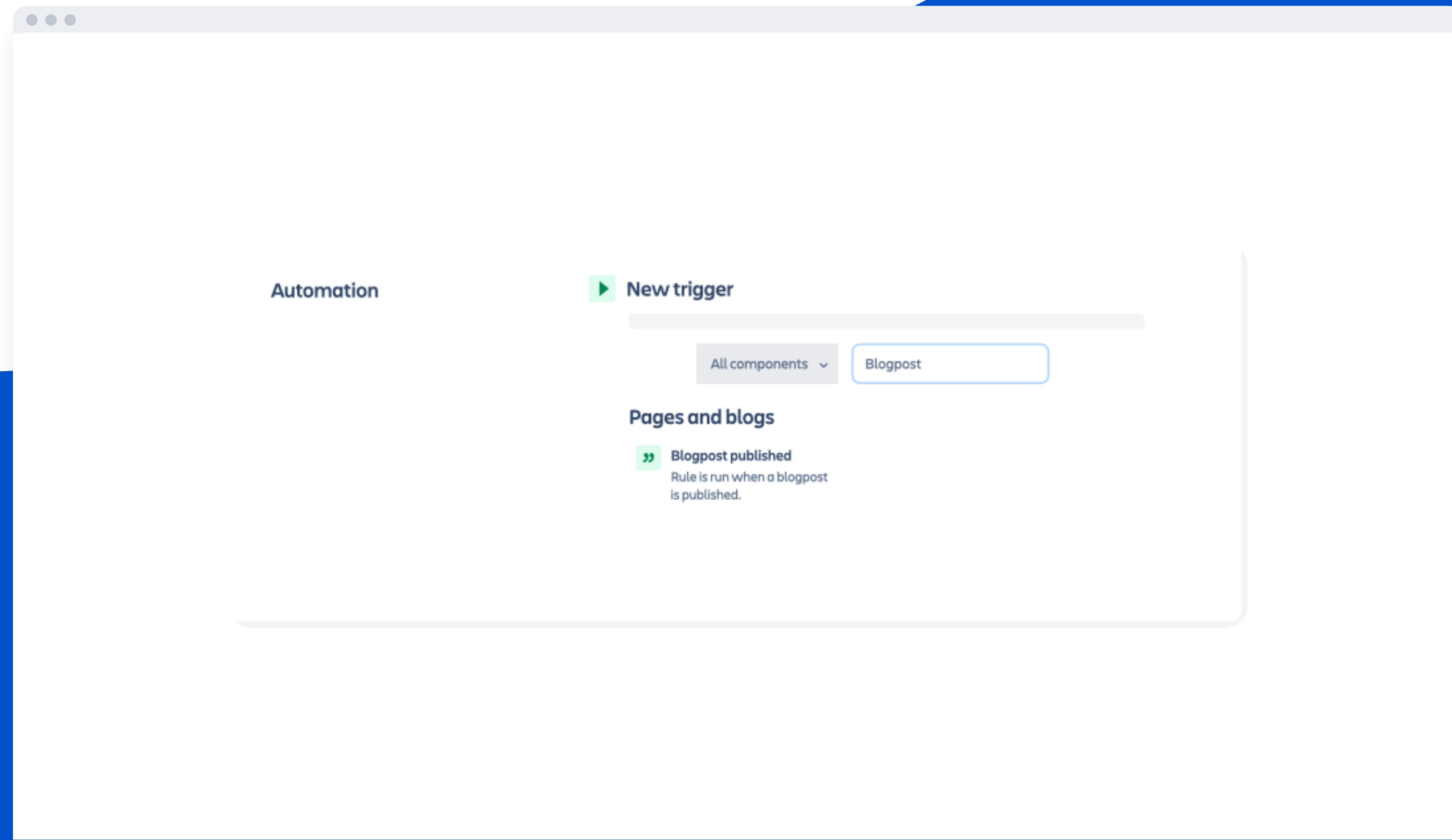
Decreased productivity

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

[← Back to library](#)

→

Notify people when the status of a page changes

Turn it on

Content Ready for Review

Rule details

Actor: Sheerine Baucum

When: Page status changed

Then: Send Slack message

Hi team. The status of the following page changed to {{page.status}}: {{page.url}}

Add component

Page status changed

Rule is run when a page status is changed.

Status changed to

Ready for review

Cancel

Save

Use cases



Workflows

Organization

Reminders

Setup

Keep spaces tidy and relevant

← Back to library

✕ → 📁

Archive inactive pages when scheduled (recurring)

Turn it on

Archive Outdated Pages

📄 Rule details

Actor: Sheerine Baucum

📅 When: Scheduled

First day of the month at 9:00 AM

📄 Branch rule / for each page

📄 Then: Archive page

○ Add component

○ Add component

📄 Branch rule / for each page 🗑

Perform actions and conditions on multiple related pages

Where

Last updated more than

6

months ago

✕

Add more criteria +

Cancel

Save

Use cases

Workflows

Organization

Reminders

Setup

Keep work on track

← Back to library

✕ → ☑

Remind teammates about incomplete tasks when scheduled (recurring)

Turn it on

Task Approaching Due Date

📘 Rule details

Actor: Sheerine Baucum

📅 When: Scheduled

every 7 Days

🔗 Branch rule / for each task

✉ Then: Send email

ⓘ

[[task.assignee.emailAddress]]

You have an incomplete task

○ Add component

○ Add component

🔗 Branch rule / for each task

🗑

Perform actions and conditions on multiple related tasks

Where

Incomplete

⌵

✕

And

⌵

Due date is coming up in

⌵

2

days

✕

Add more criteria

+

Cancel

Save

Use cases

Workflows

Organization

Reminders

Setup

Standardize team spaces

← Back to library

✖

 →

📄

 Publish the same set of pages when a new space is created

Turn it on

📄

Publish the same set of pages when a new space is created

🔍

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"

📄

Then: Publish new page

"{{now.shortDate}} Template page"

!

+

Add component

📄

Publish new page

🗑

Publish a new page in:

Space *

Same space as trigger

▼

Parent page

None

▼

Enter page title *

{{now.shortDate}} Team Retro

Template Space

📄

 Mobile App Te...

✕

▼

Template

🕒

 Retrospective

✕

▼

Cancel

Save

Confluence

Home

Recent

Spaces

People

Apps

Templates

Create

Search

Mobile App Team

Overview

Blog

Whiteboards

Analytics

Calendars

Space Settings

Bulk Archive

SHORTCUTS

Pages

Archived pages

Mobile App Team

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

Weekly meeting notes

Brainstorming

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.

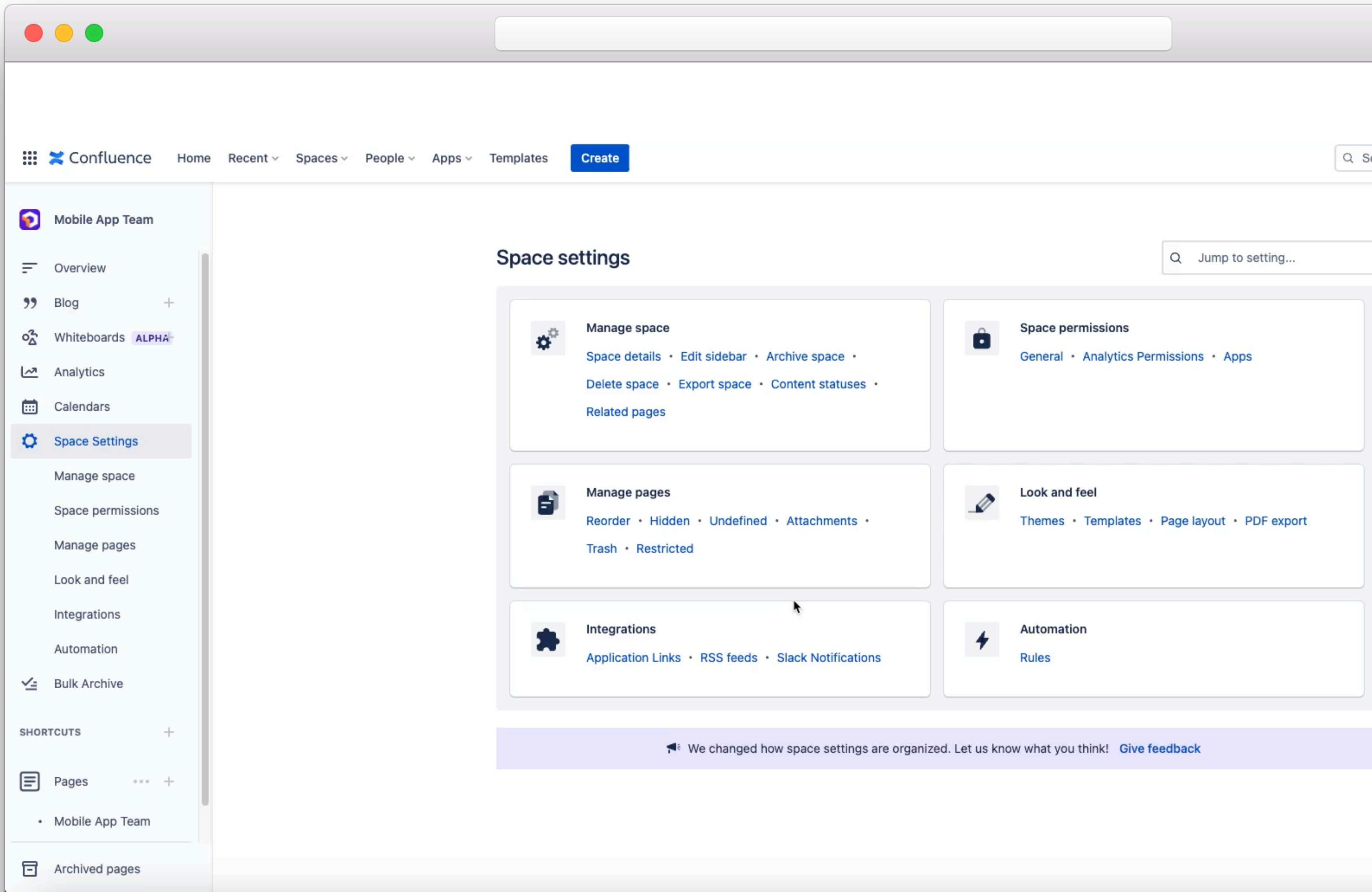
LET'S BUILD!

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

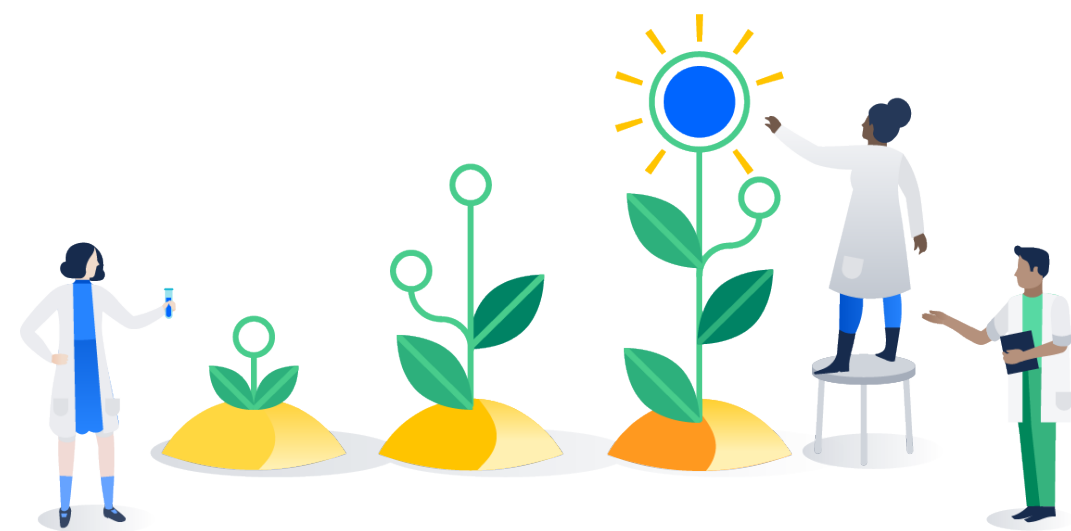
Use smart values, like current date, when setting up recurring meeting notes and pages.



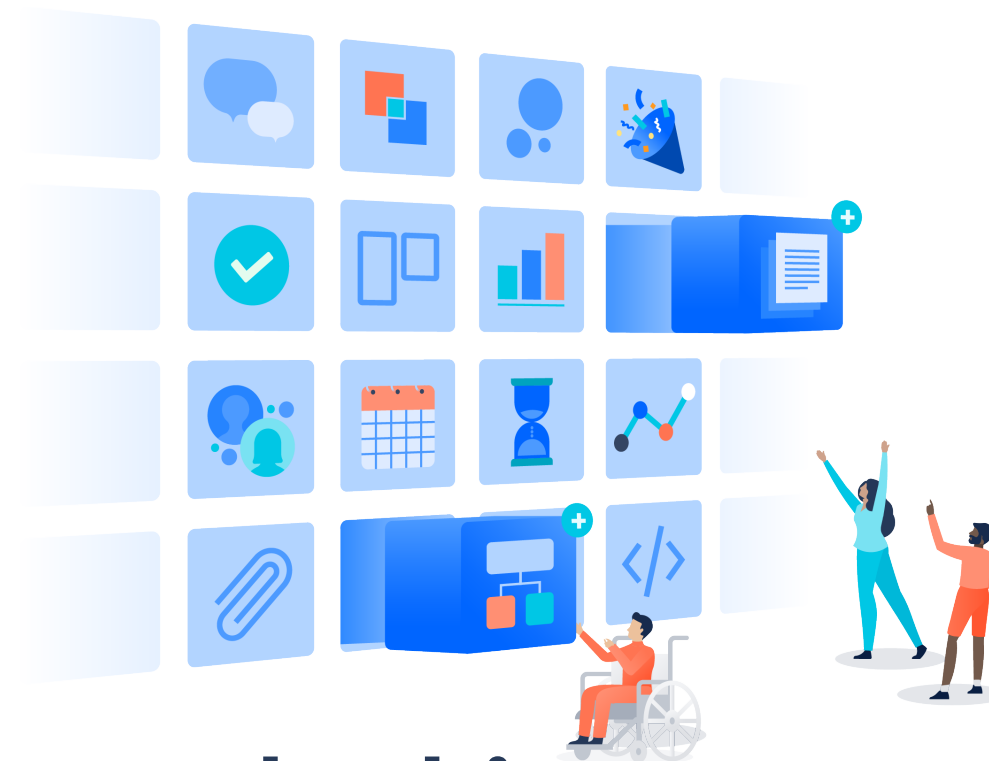
Test your rule

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



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