

Integrating Jira and Confluence, Accessing Whiteboard, Retro, Roadmap, Concept Map, Workflow, Flow Chart with Ease

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Abstract

The article provides overview covering different features, use cases, benefits and capabilities of Confluence an Atlassian product used for content writing and documentation of Software products/projects. Integrating and connecting Confluence with Jira another Atlassian product used for Bug tracking, issue tracking and agile project management.

Keywords: Confluence, Jira, Whiteboard, Flowchart, retro, roadmap, workflow, Concept map, Atlassian, agile project management, bug tracking, issue tracking

I. INTRODUCTION TO CONFLUENCE

Confluence is a collaboration tool by Atlassian that helps teams create, store and share content. The content comes in the form of pages. From small startups to large corporations, engineering teams to marketing teams, all use this as a documentation tool. A tool that has become popular across all teams throughout the world. Confluence is different from other content writing tools, features that make the difference are:

- Confluence allows to easily organize all the work into personal space. One can have folders, pages and more allowing to create a hierarchy of information. That way every single document is easy to find.
- A page can be set as restricted allowing specific team members to view only or open to all for everyone to view. Acts as a digital library of information on what everyone has worked on in the company for however many years.
- Reduced redundancy – easy to search. Before starting any project a quick search can be done to view all the work/research done.
- Sharing companywide resources/information and much more

II. USE CASES

1) *A shared knowledge hub for every team:*

Create flexible documentation that includes text, images, code, tables, Figma files and more:

- Make pages easy to read and formatted, quickly with the slash command.
- Embed and edit content from other tools like design files, code repositories, spreadsheets, and more.
- Customize documentation to suit your unique team needs with cover images, emojis, whiteboards and more.

2) *Find answers fast*

Atlassian Intelligence brings AI-powered automation to Confluence.

- Accelerate your searches for content and answer questions instantly with auto-suggestions.
- Reduce confusion with info tips that automatically define any acronym or word.
- Share automated page summaries so teammates can save time.

3) *Organize with ease*

Confluence simplifies wiki management with an intuitive and visual system, so anyone can contribute.

- Easily organize content by dragging and dropping wiki pages where you want them.
- Boost productivity by using automation to apply updates or repetitive tasks from one page to multiple.
- Avoid version control confusion with page revision history that includes who made updates and the ability to reverse changes.

4) *Make knowledge accessible*

Communicate, share information, and tackle projects together with clear and open documentation.

- Create and edit pages with the whole team in real time or async.
- Seamlessly collect feedback or have discussions with in-line comments.
- Notify team members of updates with @ mentions they can't miss.

III. CONFLUENCE WHITEBOARDS

A. *Benefits*

1) *Cost savings*

Less expensive per user when compared to most standalone whiteboarding tools.

2) *Consolidate tools*

Whiteboards in Confluence makes eliminating standalone whiteboarding tools from your tech stack a no-brainer.

3) *Advanced integrations*

Integrate and connect your work in whiteboards for increased efficiency and reduced context switching.

B. *Use Cases*

1) *Brainstorm without boundaries*

Collaborate, brainstorm, draw, and visualize in a freeform way

- Illustrate with stickies, lines, sections, and more
- Engage teammates with real-time editing
- Collaborate using stamps, timers, and more

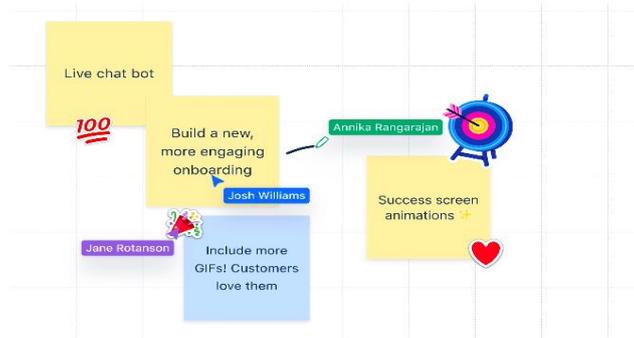


Fig. 1. Picture of brainstorming using confluence whiteboards from Confluence documentation

2) *Built-in Jira integrations*

Quickly move from thinking to action in the tools you use.

- Convert stickies and shapes into Jira work items
- Create relationships between work items from a whiteboard using smart connectors
- Take action in bulk using smart sections

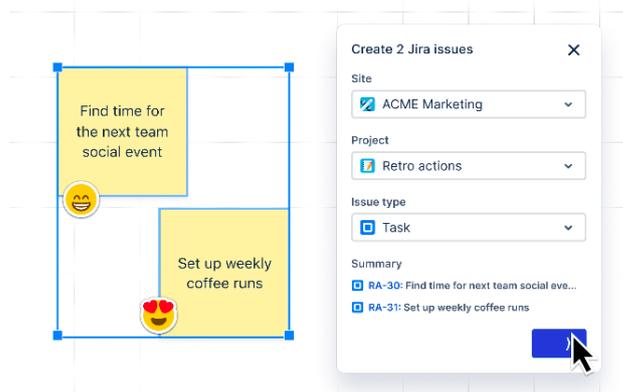


Fig. 2. Picture of Jira creation from confluence taken from Confluence documentation

3) *Connect your work*

Reduce the need for context switching by connecting your favorite tools.

- Edit Jira work items, Confluence pages, and more without leaving your whiteboard
- Embed Confluence pages and other Smart Links to see the whole picture
- Reference work across tools like Figma, Google Docs, and Youtube.

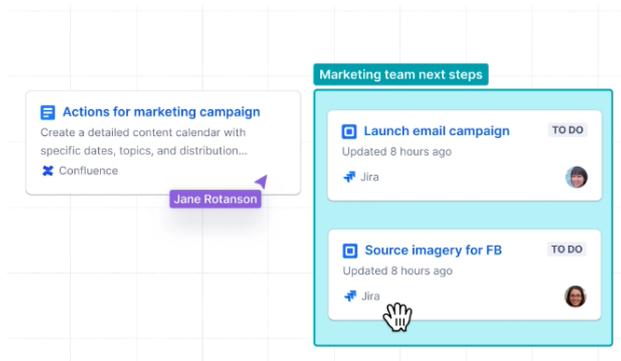


Fig. 3. Making all edits from one place taken from Confluence documentation

Confluence whiteboards are the integrated whiteboarding solution for teams who don't want to add another tool to their tech stack. Develop creativity and generate fresh ideas with a disruptive visual brainstorm.

C. Templates Available

1) *Flow Chart*

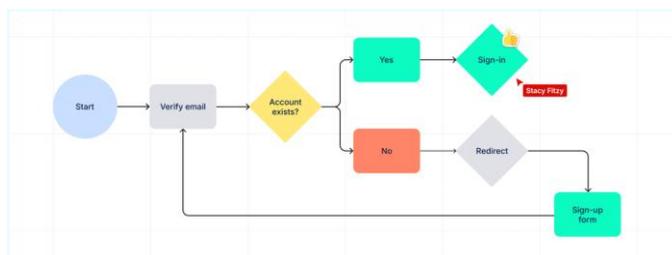


Fig. 4. Flow chart in confluence taken from Atlassian documentation

2) *Simple Retro*

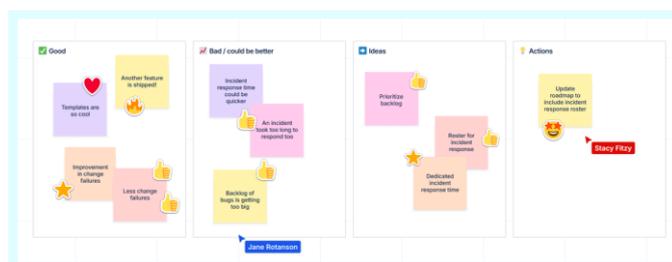


Fig. 5. Simple Retro in confluence taken from Atlassian documentation

3) *Roadmap*

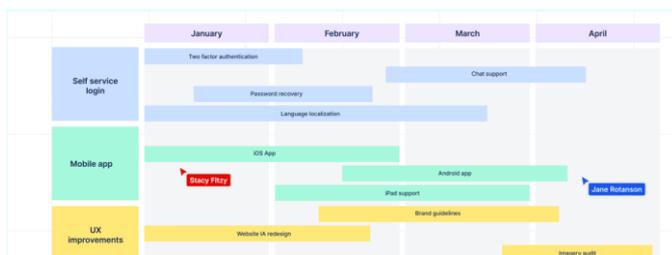


Fig. 6. Road Map in confluence taken from Atlassian documentation

4) *Workflow*

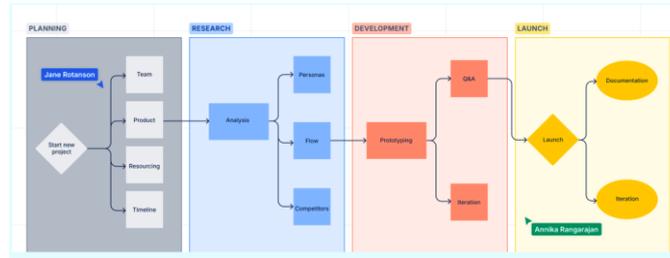


Fig. 7. Workflow in confluence taken from Atlassian documentation

5) *Concept Map*



Fig. 8. Concept Map in confluence taken from Atlassian documentation

IV. USING CONFLUENCE AND JIRA TOGETHER

Confluence and Jira offer a complete solution for all team types to deliver their best work. Teams can use Jira to manage their projects and embed relevant context for their tasks using Confluence so everyone stays in sync and can deliver results, faster. When teams integrate Confluence and Jira, they work together to provide robust project management and document collaboration.

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 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.

A. Connect a Confluence space to a Jira project

This is the first step to integrating Confluence and Jira.

- Navigate to Project Pages in the Jira left-hand sidebar
- Click Connect to Confluence
- Search for the Confluence space you want to connect

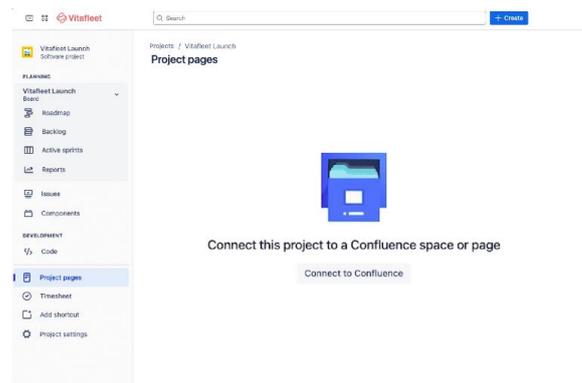


Fig. 9. Connecting confluence to Jira step 1 taken from Atlassian documentation

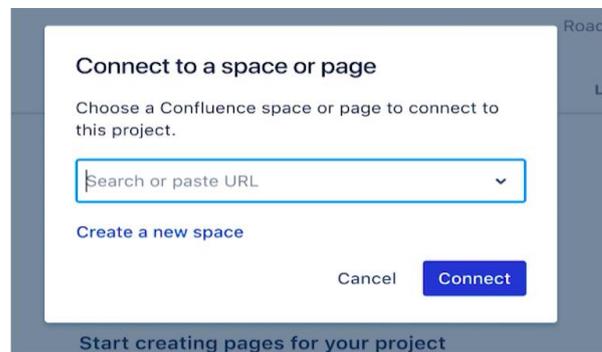


Fig. 10. Connecting confluence to Jira step 2 taken from Atlassian documentation

B. Add a Jira shortcut to a Confluence page

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

- Copy the URL of your Jira project
- Navigate to the Confluence space you'd like to connect it to
- Tap + (Add shortcut) option in the Confluence left-hand sidebar
- Paste your Jira project URL in the Edit space shortcuts dialog box, and name your shortcut for easy reference

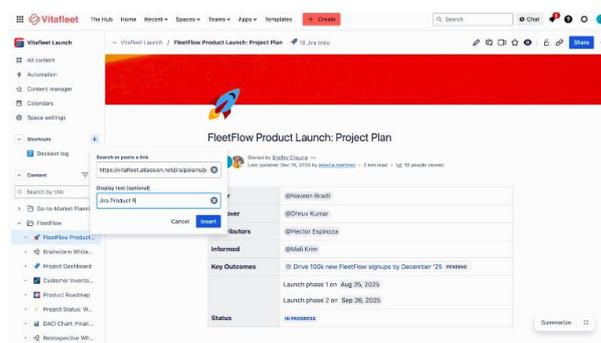


Fig. 11. Adding Jira shortcut to confluence taken from Atlassian documentation

Now you can smoothly navigate to your Jira project by clicking on the shortcut in the left sidebar. Anyone can add a shortcut to the side navigation in any space, and admins can create keyboard shortcut links.

C. Add a Confluence shortcut to a Jira project

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

- Navigate to the Confluence page you'd like to link to Jira—this is probably your space overview page
- Copy the page URL by selecting Share
- In your Jira project of choice, select Add Shortcut in the center navigation bar, and select Shortcut
- Paste the Confluence page URL and name your shortcut, just as you did in Confluence

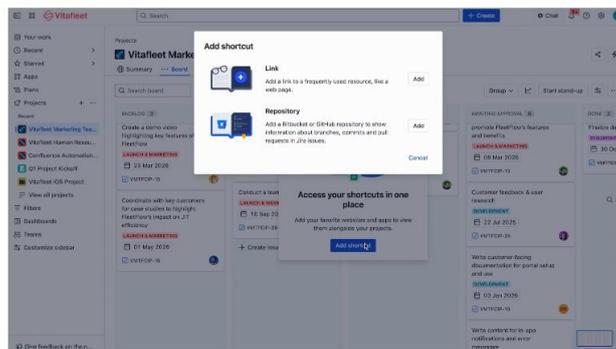


Fig. 12. Adding Confluence shortcut to Jira project taken from Atlassian documentation

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.

D. Use Confluence in Jira

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

1) View, create, and edit pages from Jira Project pages

Managing Confluence pages and whiteboards is seamless within Jira.

- From the Project Pages section, you can view a page by selecting it, which opens in an embedded window—no need to switch tools.
- Creating new content is just as simple: start with a blank Confluence page or use a template, all accessible directly within Jira. Editing is intuitive too—hover over any embedded page, click the pencil icon, and make your changes without leaving Jira.
- This streamlined integration ensures you can view, create, and edit content efficiently, all in one place.

2) *Add Confluence pages and whiteboards directly to Jira work items*

Give important context to tasks by adding documentation or information directly in Jira work items. You can do so by adding links to pages and whiteboards to your Jira work items or add links to your Jira work items to Confluence pages.

“+ Add” button

By selecting the “+ Add” button, you can choose to either link to existing Confluence content, Create a new Confluence page, or Create a Confluence whiteboard from a drop down menu.

Link to Confluence content

You can easily link existing Confluence pages to your Jira work items to keep important documentation, meeting notes, or project plans accessible.

1. Open the Jira work item where you want to add Confluence content.
2. Select the “+ Add” button and select Existing Confluence page”
3. A new section titled ‘Confluence content’ will appear, and you can link Confluence content by searching for a page or pasting in the link. You can also filter by space.
4. A link to your selected Confluence page will populate, showing the page title, updated status, and who updated it last.

Create a Confluence page

Sometimes you may need to create a new Confluence page directly from Jira to document a task or share additional resources.

1. Open the Jira work item where you want to create a new Confluence page.
2. Open the dropdown menu next to the + Add Create button and select New Confluence page
3. A new Confluence page will be created and automatically linked to the Jira work item.
4. You can now edit the new Confluence page within Jira and add relevant information.
5. The link to your new Confluence page will appear under Confluence Content in your Jira work item.

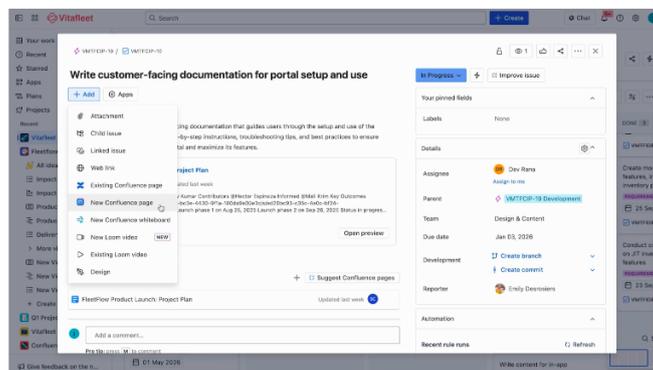


Fig. 13. Creating a Confluence page from Jira project taken from Atlassian documentation

Create a Confluence whiteboard

Confluence whiteboards offer a space for brainstorming and collaboration directly linked to Jira work items.

1. Open the Jira work item where you want to create a new Confluence whiteboard.
2. Open the dropdown menu next to the + Add button and select New Confluence whiteboard.
3. A new Confluence whiteboard will be created and automatically linked to the Jira work item.
4. You can now edit the new Confluence whiteboard within Jira and add relevant information.
5. The link to your new Confluence whiteboard will appear under Confluence Content in your Jira work item.

Smart Links

When you copy and paste Confluence content URLs into a Jira work item description, a Smart Link will appear. Confluence Smart Links reveal important context about the page directly in the Jira work item. To add a Smart Link:

1. Copy the page URL in the browser address bar or by selecting Share and Copy link.
2. Paste the URL in the Jira work item view description.
3. A Confluence Smart Link will appear. To change the level of viewable context, click into the description, hover over the Smart Link and select Configure. Then select URL, Inline, Card, or Embed.
4. Select Save to save your Jira work item description.

Also, Jira work item URLs that are pasted into Confluence pages and whiteboards will appear in the Confluence pages section of a Jira work item, so you can easily find relevant documents where the work item is mentioned.

Create a Jira work item from text highlight

1. Open the Confluence page containing the text you want to use for the Jira work item.
2. Highlight the text or section that you want to convert into a Jira work item.
3. Once the text is highlighted, a small toolbar will appear above the selection. Click on the + Jira Work Item button.
4. A dialog box will open, allowing you to specify details of the Jira work item, such as the project, type, summary, description, and any other required or relevant fields. The highlighted text will automatically be inserted into the description field.
5. Review the work item details and make any necessary adjustments.
6. Click Create to generate the Jira work item. The work item will be created in Jira and linked back to the Confluence page for easy reference.

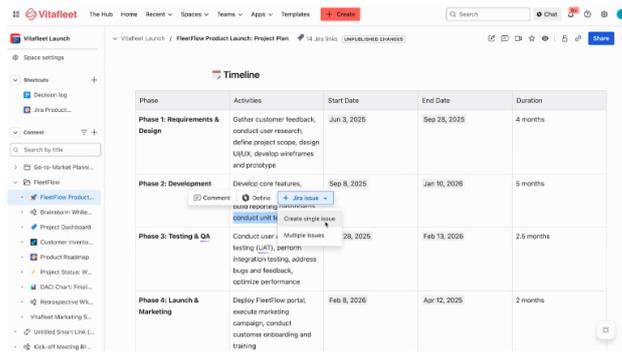


Fig. 14. Creating a Confluence page from Jira project taken from Atlassian documentation

Conclusion: Confluence is a great documentation tool for small and large corporations used widely. It makes sharing knowledge easier and boosts productivity by using automation to apply updates from one page to another. Integration of Confluence and Jira gives the power to organize all of the ideas, content, and files created by the team bringing organizations vision to life. Confluence and Jira offer a complete solution for all team types to deliver their best work.

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