Creating Your Knowledge Base Space

This guide is for people who want to develop and publish a knowledge base using Confluence. You’ll find Confluence useful because it combines professional web publishing features with the ease-of-use and flexibility of a wiki - requiring a low barrier to entry, but high quality output for all your team members. Confluence provides all of the collaborative features for your reports (such as automatic versioning, granular enterprise security, email and RSS subscriptions, and JIRA integration). This page is a quick-start guide to creating a wiki space for a knowledge base.

Quick guide to creating a knowledge base space

- Add a Space and Select the Documentation Theme
- Set the Space Permissions
- Customise the Title and Content of the Homepage
- Customise the Documentation Theme
- Create an Inclusions Library to Manage Reusable Content
- Create the Table of Contents
- Make your Knowledge Base Proactive with a Subscribable RSS Feed
- Insert Google Analytics Code into Confluence's Custom HTML
- Set up Atlassian's Content Survey and Reporting Plugin

The rest of this page gives more details of the above procedure.

Step 1. Add a Space and Select the Documentation Theme

Below is a quick guide to adding a space. See Setting up a New Global Space for a full description.

1. Go to the Confluence dashboard and click the ‘Add Space’ link located above the list of spaces.
2. The ‘Create Space’ screen appears. Enter a space name and a short, unique space key.
3. Leave the settings as default, or choose to allow only yourself to view or contribute content to this space. You can change these settings later and with more flexible options.
4. Select the ‘Documentation Theme’.
5. Click ‘OK’.

The homepage of your new space will appear. Because you created the space, you are the space administrator. Now you can do some basic configuration, as described in the sections below.

Step 2. Set the Space Permissions

Define the space permissions to determine who can do what in your new space.

1. Open the ‘Browse’ menu and select ‘Space Admin’.
2. Click ‘Permissions’ in the left-hand panel.
3. Confirm your administrator access as prompted.
4. Click ‘Edit Permissions’.
5. Set the permissions to suit your needs then click ‘Save All’.
   - You can add groups and/or individual users to the list, then select the permissions for each group or user.
   - You can also set the permissions for anonymous users? these are people who have not logged in to the wiki. Anonymous access is available only if enabled for the entire Confluence site. We recommend this setting if you are using this space for Technical Documentation or for a Knowledge Base.
   - Note that you can change these permissions at any time. You may want to restrict the permissions to specific groups now, and later open the space to more people.

A Bit More about Permissions

Confluence has a robust and granular permissions scheme that you can use to determine who can view, comment on and even update the documentation. There are three levels of permissions in Confluence:

- Global permissions apply across the entire site.
- Space permissions apply to a space.
- Page restrictions allow you to restrict the editing and/or viewing of a specific page. Below we discuss a way of using these in the draft, review and publishing workflow.

Space permissions in Confluence are simple yet granular enough to be useful for technical documentation. You can:

- Use the permission levels to control who can create pages in the space, delete pages, create comments, delete comments, administer the space, and so on.
- Grant a permission level to one or more users, and/or to one or more groups, and/or to anonymous users.
Terminology:

- 'Anonymous': means people who have not logged in to the wiki. These are users that won't affect your the number permitted by your license.
- The 'confluence-users' group is the default group into which all new users are assigned. Everyone who can log in to Confluence is a member of this group.

For example, you might allow 'Anonymous' users specific view and content creation rights so that they can access and engage with your knowledge base while your team lead (Bill) maintains full Space Administration rights.

For detailed information, see the documentation on:

- Global permissions
- Space permissions
- Page restrictions
- Users and groups

Step 3. Customise the Title and Content of the Homepage

When you created your space, Confluence created a homepage with default content and a default title, 'Home'. You will want to change the title and content.

1. Go back to your space homepage, by clicking the space name in the breadcrumbs at the top of the screen. In the example below, the space name is 'My Knowledge Base Space':
   - .
2. The space homepage appears. By default, the page title is 'Home':
   - .
3. Click 'Edit'.
4. The page opens in edit mode. Change the title to suit your needs.
   - .
5. Update the content to suit your needs.
   
   Hint: If you do not know what to add yet, just add a short description. You can refine the content of the page later. Take a look at an example of a homepage.
6. Click 'Save'.

Step 4. Customise the Documentation Theme

When you added this space you chose the Documentation theme, which provides a left-hand navigation bar and a good look and feel for a knowledge base. If necessary, you can configure the Documentation theme to add your own page header and footer or to customise the default left-hand navigation bar. These customisations affect the online look and feel of your knowledge base. See Configuring the Documentation Theme for the full description in our product documentation.

1. Open the 'Browse' menu and select 'Space Admin'.
2. Click 'Themes' in the left-hand panel.
3. If the space is not yet using the Documentation theme, apply the theme now.
4. Click 'Configure theme' in the yellow area of the 'Current Theme' section at the top of the page.
   - .
5. The 'Documentation Theme Configuration' screen appears. Customise the left-hand navigation bar, header and footer to suit your needs. Details are in the documentation. Here are some hints:
   - The 'Page Tree' check box determines whether your space will display the default search box and table of contents (page tree) in the left-hand panel.
   - The 'Limit search results to the current space' check box determines whether Confluence will search only the current space or the whole Confluence site. This setting affects the default search. Viewers can override it each time they do a search.
   - Enter text, images, macros and other wiki markup into any or all of the three text boxes for the left-hand navigation bar, header and footer. You can use the Include macro and the Excerpt include macro to include re-usable content.
   - Any content you add to the navigation panel will appear above the default page tree.
   - If you like, you can remove the default page tree (by unticking the box) and add your own, customised version of the Pagetree macro instead.
6. Click 'Save'.

Example of a Customised Footer

Take a look at the footer of a page in the Crowd documentation space.

- .

To produce the above footer, we have the following content in the footer panel in the Documentation theme configuration screen:
   - .

Here it is in text form:

```
{include: _Documentation Footer|nopanel=true}
{include: ALLDOC: _Copyright Notice|nopanel=true}
```
The above content consists of two Include macros.

- The first macro includes a page called Documentation Footer. This page contains the big blue buttons and hyperlinked text.
- The second macro includes a page from a different space, the ALLDOC space, called Copyright Notice. This page includes our standard copyright notice, used in all our documentation spaces.
- In each include macro, the content has been drawn from an inclusions library, a hidden content repository, from which you can store frequently and reusable content throughout your knowledge base space.

Step 5. Create an Inclusions Library to Manage Reusable Content

Using Confluence, you can dynamically include content from one page into another page. You can include a whole page into another one, using the Include macro. You can also define an ‘excerpt’ on a page, and then include that excerpted text into another page using the Excerpt Include macro.

To organise your re-usable content, we recommend that you create a set of pages called an ‘inclusions library’.

Some notes about inclusions libraries:
- The inclusions library is not a specific feature of Confluence. The pages in the inclusions library are just like any other Confluence page.
- The pages are located at the root of the wiki space, not under the homepage. This means that they will not appear in the table of contents on the left and they will not be picked up by the search in the left-hand navigation bar either.
- The pages will be picked up by other global searches, because they are just normal wiki pages.
- We have decided to start the page name with an underscore. For example, '_InclusionLibrary'. This indicates that the page is slightly unusual, and will help prevent people from changing the page name or updating the content without realising that the content is re-used in various pages.

Examples of Inclusions Libraries

Here are some examples in our documentation:

- Crowd inclusions library
- Confluence inclusions library

Step 6. Create the Table of Contents

Create the table of contents for your knowledge base, by adding the top-level pages for all the usual sections. For instance, our Technical Support Team designed the following pages in the Confluence Knowledge Base on our public wiki:

- Browse Articles by Label
- Browse Articles by Top Ranked Content
- Browse Articles by Page Tree Hierarchy
- Browse Articles by Version
- Subscribe to Proactive Announcements

Now do the same for all the sections of your Knowledge Base that you wish to appear in the left-navigation bar of the Documentation theme. Below is what the Table of Contents looks like for our Confluence Knowledge Base:

- Step 7. Make your Knowledge Base Proactive with a Subscribable RSS Feed
Let's populate the knowledge base homepage with content by creating an RSS feed that your coworkers and customers can subscribe to and receive important updates on your knowledge base and technical alerts on your products.

This is a strategy that Atlassian’s Technical Support Team uses to create a proactive knowledge base that provides technical alerts to customers and coworkers and helps solve support issues before they’re even created.

By following the quick guide below, you'll create a homepage similar to the one Atlassian’s Technical Support Team has created for the Confluence Knowledge Base on our public wiki and turn your knowledge base from reactive to proactive:

**Creating your RSS Feed**

Confluence can filter spaces by content type. To filter your knowledge base for ‘blog post’ content, do the following:

1. Open the ‘Browse’ menu and select ‘Blog Posts’.
2. Copy this URL to your clipboard.
3. Create an RSS feed for the URL of your knowledge base space.

Now your RSS feed will consist of any blog posts created in the knowledge base space.

**Highlighting Your Technical Announcement RSS Feed**

1. Go to your space homepage by clicking the appropriate breadcrumb in the top-left of your screen.
2. Click ‘Edit’.
3. Insert an ‘h2’ heading, such as ‘Important Technical Announcements’.
4. Insert bold text that reads something like, ‘Copy the RSS feed into your favourite RSS reader!’.
5. Launch the Macro Browser by clicking the Macro Browser icon in the toolbar of the editor.
6. Select the ‘Panel’ macro in the Macro Browser and specify your desired macro preferences. We recommend that you change the ‘Panel Title’, ‘Border Style’, and ‘Background Color’ to further highlight the panel on the page.
7. Click ‘Insert’.

**Insert a Blog Posts Macro**

1. Place your cursor between the two Panel macros and launch the Macro Browser again by clicking the Macro Browser icon in the toolbar of the editor.
2. Select the ‘Blog Posts’ macro in the Macro Browser and specify the following preferences:
   - ‘Content Type to Display’: Title
   - ‘Restrict to These Spaces’: Your knowledge base Spacekey
   - ‘Maximum Number of News Items’: 5
   - ‘Sort By’: Creation
   - ‘Reverse Sort’: Tick the box
3. Click ‘Insert’ to insert the Blog Posts macro onto the page inside your Panel macro.

Now your panel will display the last 5 blog posts created in your knowledge base space.

**Inserting your RSS Feed into your ‘Technical Announcement’ Panel**

First, let’s create a link so that your coworkers and customers can view all of the blog posts in your knowledge base space. See Working with Links for a full description in our product documentation.

1. Place your cursor after/below the Blog Posts macro, but before your closing Panel macro tag.
2. Type: ‘View more recent blog posts’.
3. Highlight this text and then click the Insert Link icon in the toolbar of the Confluence editor to launch the Link Dialog.
4. Select ‘Web Link’ from the left-navigation and insert the link you copied to create your RSS Feed.
5. Click ‘Insert’.

Now, let’s insert your RSS Feed into your panel by linking an image. See Linking an Image for a full description in our product documentation.

1. Attach an RSS Icon to the page by dragging and dropping it into the Rich Text Editor (preferably below the link you just created). See Drag-and-Drop for a full description in our product documentation.
2. Select the RSS Icon image and then click the Image Browser icon in the toolbar of the editor to launch the Image Browser.
3. Align your image to the right and give the image a border. Then click ‘Insert’ to insert the RSS Icon in the bottom right of your panel.
4. Link the RSS Icon by selecting the image and then clicking the Link Dialog icon in the toolbar of the editor.
5. Select ‘Web Link’ from the left-navigation and insert the RSS Feed URL you created.
6. Click ‘Insert’ to link your RSS Feed to the RSS Icon image.
7. Click ‘Save’ to save your page and test your RSS Icon.
Congratulations! You have successfully created a proactive knowledge base.

Step 8. Insert Google Analytics Code into Confluence's Custom HTML

Now that you have a strong foundation for a knowledge base, it's critical to assess how effectively it services your customers. Google Analytics is a tool that gives you rich insights into your website traffic and marketing effectiveness. You are going to want to understand how your customers are accessing the resources in your knowledge base. This is a quick guide to inserting Google Analytics HTML code into Confluence so you can measure your knowledge base traffic.

1. If you don't have one already, create a Google Account and then create a Google Analytics Account using your Confluence instance's URL.
2. Copy the Google Analytics code to your clipboard.
3. Log into Confluence as a System Administrator or Confluence Administrator.
4. Go to the Confluence 'Administration Console'. To do this:
   a. Open the 'Browse' menu and select 'Confluence Admin' from the drop-down. The 'Administrator Access' login screen will be displayed.
   b. Enter your password and click 'Confirm'. You'll be temporarily logged into a secure session to access the 'Administrator Console'.
5. Select 'Custom HTML' in the left navigational panel under the heading 'Look and Feel'.
6. Click 'Edit' to insert custom HTML into your Confluence instance.
7. Paste your Analytics code you have saved to your clipboard into the table labeled 'At end of the BODY'.
8. Click 'Save'.

You can now monitor the activity and traffic for every page you create in your Confluence instance and Knowledge Base. Hint: If your knowledge base only represents a space within your greater Confluence instance, you can search Google Analytics for activity in the specific space by exclusively filtering for the space key.

Read David Simpson's blog post about Tracking Confluence Usage with Google Analytics for more information.

Step 9. Set up Atlassian's Content Survey and Reporting Plugin

Now that you can monitor the traffic and activity of your knowledge base, let's measure its effectiveness. When the Content Survey and Reporting Plugin is activated for a space, it will generate a report that includes:

- Direct feedback from customers about article quality
- Amalgamated "composite score" results
- Answers to secondary questions, such as "Was the info complete?" or "Was the article well-written?".
- Rollup at-a-glance view of the metrics for the whole space

Lastly, the Content Survey and Reporting Plugin will institute 'intelligent searching' which means that based on the results of the surveys, higher ranked pages are promoted in search results, so your best and most popular pages are found easiest. This is a quick guide for how to set up the Content Survey and Reporting Plugin.

This plugin only functions properly if the Documentation Theme is applied to the space.
Let's install the Content Survey and Reporting Plugin using Confluence's Universal Plugin Manager.

Installing the Content Survey and Reporting Plugin

1. Log into Confluence as a System Administrator or Confluence Administrator.
2. Go to the Confluence 'Administration Console'. To do this:
   a. Open the 'Browse' menu and select 'Confluence Admin' from the drop-down. The 'Administrator Access' login screen will be displayed.
   b. Enter your password and click 'Confirm'. You'll be temporarily logged into a secure session to access the 'Administrator Console'.
3. Select 'Plugins' in the left navigation panel under the heading 'Configuration'.
4. Click the 'Install' tab of the UPM and search for the 'Content Survey and Reporting Plugin'?.
5. Click 'Install Now'.

Now that you've installed the Content Survey and Reporting Plugin, let's configure a survey:
Configuring a Survey

1. Go to your space homepage by clicking the appropriate breadcrumb in the top-left of your screen.
2. Open the 'Browse' menu and select 'Space Admin'.
3. Select 'Configure Survey' in the left navigation panel under the heading, 'Knowledge Base Survey'. Here you can:
   - Add a question
   - Edit a question's text
   - Activate or deactivate a question
   - Edit the response text
4. Configure a 'Primary Question' for the survey
5. Click 'Save'.

Now that you’ve added a primary question, let's test out the plugin by adding it to the footer of the Documentation theme so that every page within your Knowledge Base space includes your survey.

Invoking the Content Survey and Reporting Macro

1. Go to your space homepage by clicking the appropriate breadcrumb in the top-left of your screen.
2. Open the 'Browse' menu and select 'Space Admin'.
3. Select 'Themes' in the left navigation panel under the heading 'Look and Feel'.
4. Click 'Configure theme' in the yellow area of the 'Current Theme' section at the top of the page.
5. Visit the 'Footer' section of the 'Documentation Theme Configuration' page and insert this recommended markup to achieve a nice layout of the Content Survey and Reporting Plugin:
6. Click 'Save' and go to your space homepage to view your Content Survey and Reporting Plugin in the footer of the page.

With the Content Survey and Reporting Plugin you can dramatically improve the quality of our knowledge base and the efficiency with which your team creates and maintains it. Here is an example of how our Technical Support Team uses the Content Survey and Reporting Plugin in the Confluence Knowledge Base:

Content Survey and Reporting Plugin Results:

Survey results are viewable by Space Administrators only. The plugin develops three results:

- Pages with Results - Determine page-by-page, which are you most effective knowledge base articles and which ones need improvement.
- Pages without Results - These are the pages in your knowledge base without survey results.
- Rollup Report - This is the summary of all survey results. The report can be used to determine how effective your overall knowledge base content is.

Searching Multiple Spaces from your Knowledge Base

As mentioned, the Content Survey and Reporting Plugin generates a composite score that ranks pages and articles within your knowledge base to make the highest (most well regarded) pages more retrievable by visitors. The plugin also improves Confluence search by allowing users to search multiple spaces without ever leaving your knowledge base space. This is really helpful for users that are unfamiliar with Confluence because they can keep the knowledge base as a point of reference within the greater instance of Confluence.

At Atlassian, our product knowledge bases and product documentation exist in the same Confluence instance so that we can make both available to ‘Anonymous’ users. Our Technical Support team uses the Content Survey and Reporting Plugin to allow visiting users to search for Confluence resources in the product documentation space from the Confluence Knowledge Base space. This provides the visitor twice the chances of finding an answer to their question.

In the image below, you can see the space specific search used in the left-navigation bar to find content related to Confluence in both the 'Documentation' and 'Knowledge Base' spaces. Pages in the 'Documentation' space are listed first and pages in the 'Knowledge Base' space are listed second.

If a user doesn't choose one of the recommendations from the quick search drop-down menu, the plugin will display a search results page inside the Knowledge Base space rather than directing them to the Confluence global search page. By keeping the visitor in the same space, it will help new users find the information they need and only navigate to pages they intend to, minimising confusion and the number of times a user has to hit the 'Back' button in their browser.
Note about Plugin Support

Before installing a plugin into your Confluence site, please check the plugin's information page to see whether it is supported by Atlassian, by another vendor, or not at all. See our guidelines on plugin support.

Next Steps

See Using Templates and Formatting Macros in a Knowledge Base for next steps.