Platinum Solution Partner

Reports, Charts, Templates, CQL & Export for Confluence

1. Introduction

Reports, Charts, Templates, CQL & Export for Confluence is a Confluence reporting app that helps users create dynamic, configurable reports directly inside Confluence pages. Instead of exporting data or relying on external reporting tools, users can build reports within Confluence using either Spaces (drill-down selection) or Custom CQL as the data source.

The app supports multiple output styles, including:

- Table
- List
- Grid
- Paragraph
- Charts

This makes it suitable for both operational reporting and presentation -style content summaries. Teams can use it to track content activity, audit documentation hygiene, surface ownership details, monitor stale content, and create reusable reporting patterns across spaces.

The app is designed for content owners, knowledge managers, operations teams, admins, and Confluence users who need live, reusable reporting from Confluence content.

2. What the App Does

Reports, Charts, Templates, CQL & Export for Confluence provides a macro that can be added to any Confluence page, allowing users to create dynamic reports directly within Confluence without relying on external tools.

Using this macro, users can:

- Create reports using Spaces (drill-down) or Custom CQL as the data source.

- Load metadata using Expansions.
- Define columns and formatting.
- Apply filters.
- Display results in different report views.
- Use templates for faster setup.
- Import and export JSON recipes for reuse.
- Inspect result data using Raw View.
- Discover field paths with Explore.
- Manage large datasets with Result Limit and Pagination.
- Export report results in supported formats such as CSV or JSON where available.

The app enables teams to centralize reporting directly within Confluence.

3. Key Benefits

Centralized Reporting Inside Confluence

Users can build reports directly inside Confluence pages, keeping reporting close to the content being reported on. This reduces reliance on separate spreadsheets or manual updates.

Flexible Data Selection

Reports can be created from either **Space-based drill-down selection** for easier setup or Custom CQL for more advanced, rules-based content selection.

Multiple Presentation Styles

The same report data can be displayed in different ways depending on the audience. Tables work well for audits, paragraphs for readable summaries, grids for visual browsing, and charts for high-level insights.

Reusable and Standardized Configurations

Templates and Recipe JSON import/export make it easier to standardize reports across teams and spaces. Once a useful report has been created, it can be reused rather than rebuilt from scratch.

Permission-Aware Results

The app respects Confluence permissions, so users only see content they are allowed to access.

4. How the App Works

Reports, Charts, Templates, CQL & Export for Confluence works through a macro placed inside a Confluence page.

A report is built by combining the following pieces:

Data Source

The report begins with a data source. Users can choose either:

- **Spaces** for guided selection through spaces and pages.
- **Custom CQL** for advanced filtering and dynamic content selection.

Expansions

Expansions determine what metadata the app loads from Confluence. These are important because columns, filters, and charts often depend on the selected expansions.

Columns and Formatting

Users define which fields should be shown in the report and how those fields should be formatted.

Filters

Filters allow users to narrow the dataset further without changing the main data source.

Report View

The final data can be displayed as a table, list, grid, paragraph, or chart depending on the use case.

5. Getting Started

Setting up a report is straightforward.

Step 1: Insert the Macro

Open a Confluence page and click **Edit**, then type **/** (forward slash) to open the macro menu. Search for **"Reports, Charts, Templates, CQL & Export for Confluence"**, select it, and the macro editor will open automatically.

Step 2: Choose a Data Source

Select either:

- **Spaces**, select one or more spaces for drill-down.
- **Custom CQL**, use queries for precise, rules-based results.

Step 3: Select Report Type

Pick the report style that best matches the use case:

- **Table** for structured reporting.
- **List** for simple, easy- to-read content.
- **Grid** for card-style layouts.
- **Paragraph** for readable content summaries.
- **Charts** for visual insights.

Step 4: Add Expansions

Load only the metadata fields needed for the report. Starting small improves performance and makes setup easier.

Step 5: Configure Columns and Filters

Add the columns you want to display, adjust formatting, and apply filters if needed.

Step 6: Set Result Limit

Use a practical result limit (e.g., 50–100 items) for better performance and faster loading.

Step 7: Review Live Preview

Verify the report output in real time and ensure the data, filters, and formatting are correct before saving.

Step 8: Save the Report

Click **Save** to publish the report on the Confluence page.

6. Common Use Cases

Reports, Charts, Templates, CQL & Export for Confluence supports a wide range of reporting needs across teams and business functions.

Content Activity Reporting

Teams can create reports showing recently updated pages, recently created content, or blog activity. This is useful for weekly updates and content review cycles.

Governance and Content Quality

The app can be used to identify stale pages, missing ownership details, unlabeled content, or pages that have not been updated recently.

Team and User Reporting

Reports can show content created or modified by specific users, helping managers or content owners track contribution and ownership.

Readable Digests

Paragraph view can be used to build digest-style summaries that are easier to read than large tables.

Dashboard and Visual Browsing

Grid and chart views can be used for content dashboards, visual summaries, and quick insight widgets on Confluence pages.

7. Troubleshooting Basics

Empty Report Results

If a report shows no data:

- Check whether the user has access to the content.
- Confirm that the CQL or source selection is correct.

- Review whether filters are too restrictive.
- Check that the required expansions are loaded.

Blank Column Values

If a column is empty:

- Confirm that the field exists for that content type.
- Check that the right expansion is selected.
- Verify the JSON path using Raw View.

Chart Issues

If charts are not displaying correctly:

- Confirm that the selected field is suitable for grouping or charting.
- Check that the dataset is large enough.
- Review filters and date ranges.

Slow Performance

If the report feels slow:

- Reduce the result limit.
- Remove unnecessary expansions.
- Narrow the source scope.
- Start with a simpler report and build up gradually.

8. Support

Before contacting support, users should:

- Review the user guide.
- Check the report configuration.
- Try the available troubleshooting steps.
- Validate the setup using Live Preview and Raw View.

When raising a support request, it helps to include:

- The error message.
- Steps to reproduce the issue.
- The CQL used.
- A screenshot.
- Browser and version details.