Macros: Understanding and Inserting Dynamic Content

This article demonstrates useful macros for the ITS knowledge base and explains best practices for utilizing their functionality. For information on how to find and insert these macros, see What Are Macros?

Table of Contents

- What Are Macros?
- How To Insert Macros
- Helpful Macros and Their Functions
  - The "Tip," "Info," "Note," and "Warning" Macros
  - The "Content by Label" Macro
  - The "Expand" Macro
  - The "Table of contents" Macro
- Time-Saving Tips

What Are Macros?

Macros are visuals that dynamically organize your content and allow you to draw attention to aspects of your content that you want to have stand out to your readers. They are especially useful when you have a piece of information that is important for your readers but that does not fit into the rest of your article. Additionally, macros provide additional functionality to your articles, enabling you to do things like link pages, condense your content into accordion folders, insert page anchors, create and insert project timelines, and much more.

How To Insert Macros

1. Create your new page (for instructions on creating new pages, see Creating Articles)
2. Select the "+" in the toolbar.
3. Select the macro you want to use from the drop down menu, or select "other macros" to see the full suite of macros.
4. Once in the suite of macros, you can select macros based on categories (blue) or search for a macro by name (red).

Helpful Macros and Their Functions

The "Tip," "Info," "Note," and "Warning" Macros

The tip, info, note, and warning macros are useful ways to call out details that users should give special attention to.

When creating any one of these macros, type the name of the macro in the "Optional Title" section. Ensure that the check box below the dialogue box is checked.

Example 1: For a note macro, type "Note"

Insert 'Note' Macro

<table>
<thead>
<tr>
<th>Highlights content as a note with a yellow background.</th>
<th>Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional Title</td>
<td></td>
</tr>
<tr>
<td>Note</td>
<td></td>
</tr>
<tr>
<td>Show Exclamation Mark Icon</td>
<td></td>
</tr>
</tbody>
</table>

Tip Macro

The tip macro is used when providing information that will enhance the reader's abilities.

- Tip
  - When creating macros, title the macro for what it is (i.e. title a tip macro "Tip"). This will help the reader understand the purpose of the information.

Info Macro
The info macro is used when providing information that may be of interest to the reader but that is not necessary to understand.

Note Macro

The note macro is used when providing information that is necessary for users to understand.

Warning Macro

The warning macro is used when you need to alert your readers to an exceedingly important detail. Warning macros are for cautionary messages and should be used only when the information being conveyed is urgent.

The "Content by Label" Macro

The content by label macro is a way to use labels to automatically display links to related articles on our space. We use this macro at the bottom of every page under the "Related Articles" heading. The content by label macro chooses articles to display based on the labels you set when creating articles.

The "Expand" Macro

The expand macro is a great way to condense and categorize your content. If you have lists, bullet points, or section specific information that you do not want to clutter your article, you can condense this into a clickable link that will display your content. For example, click the blue text below:

1. This is the expand macro.
2. You can create lists, insert photos/graphs/visuals, or just put plain text.
3. The amount of space you have to insert content into the expand macro is unlimited.

Using the Expand Macro

Title your expand macro with the text you want your readers to click on. Then select Insert.

Once the expand macro is inserted into your article, you can begin typing your text, inserting photos/charts/visuals, or creating lists.

You can also embed expand macros within other expand macros:

On the published page, this will look like:
The "Table of contents" Macro

The table of contents macro allows you to link different parts of your article to the top of the page. This allows the reader to quickly access the information they need (by selecting the link) instead of having to scroll through the whole article to find what they need. For example, selecting your topic of interest at the top of this article allows you quickly navigate to the information you want to see. You are not required to use the table of contents macro, but it can be a great way to streamline your reader's experience. The table of contents macro should be used for long articles or articles that require a lot of scrolling.

The table of contents macro chooses the links to display solely based on the headings and heading numbers. You only have to set-up the table of contents macro to choose the correct headings (see below).

Using the "Table of Contents" Macro

Scroll down to the section of the macro setting window displayed below.

1. Change "Maximum Heading Level" to 3. This ensures that the table of contents will only contain links to sections with headings 1, 2, or 3.
2. Under "Exclude Headings", type "Table of Contents". This will ensure that there will not be a link to the table of contents in the table of contents.

Placing the "Table of Contents" Macro

We do not want the table of contents to contain links to sections with heading levels 4 or higher.
Put the table of contents macro at the top of the article after the article summary but before the rest of the article. See the top of this article for an example.

Put “Article Overview” as the heading above the table of contents and make sure you exclude the “Article Overview” heading from the table of contents.

- To exclude headings from the table of contents: left click on the TOC macro, click edit, scroll down to “Exclude Headings” and type in “Article Overview”.

**Time-Saving Tips**

1. When adding macros, type “[” followed by the macro name. Then select the macro you want to insert.

2. When adding headings, type “hn.” where n is the number of the heading you want. Then click the space bar.

   Make sure there are no spaces before the “hn.” text, and make sure you click the space bar after typing “hn.” otherwise this functionality will not work.

For a complete list of Confluence macros and other time-savings tips, see [Confluence Macros](#) and [Confluence Keyboard Shortcuts](#).