



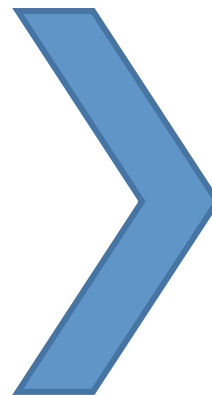
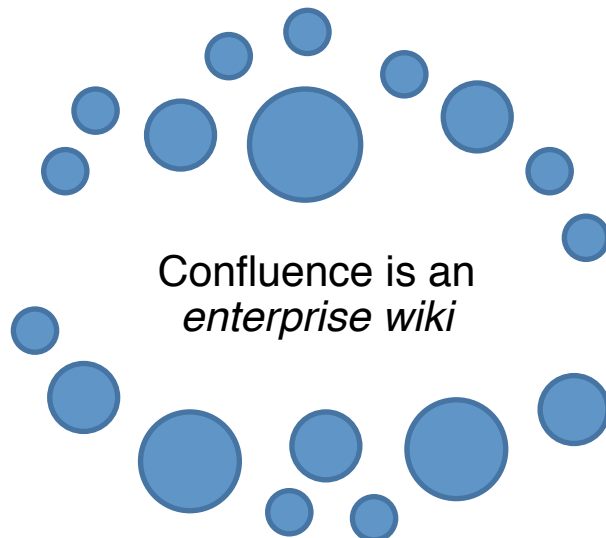
Confluence Fundamentals Course

Objectives

- Understand Confluence structure and organization
- Confluence Space and Page basics
- Learn how to create pages and perform page operations

What is Confluence?

- Confluence is an enterprise wiki that allows content collaboration



Confluence as an Enterprise Wiki

- Create/Manage/Search Content (functional, technical, notes, etc.)
- Organize content by teams, groups, projects
- Build and Manage Page hierarchy
- Advance content formatting
- Manage Content Security
- Track Versions
- Promote Standards
- Macros and connectors to other enterprise systems (JIRA, HipChat, Outlook etc.)

Common Use Cases



- Website
- Technical/FAQ Documentation

- Organizational Communication
- Knowledge Base

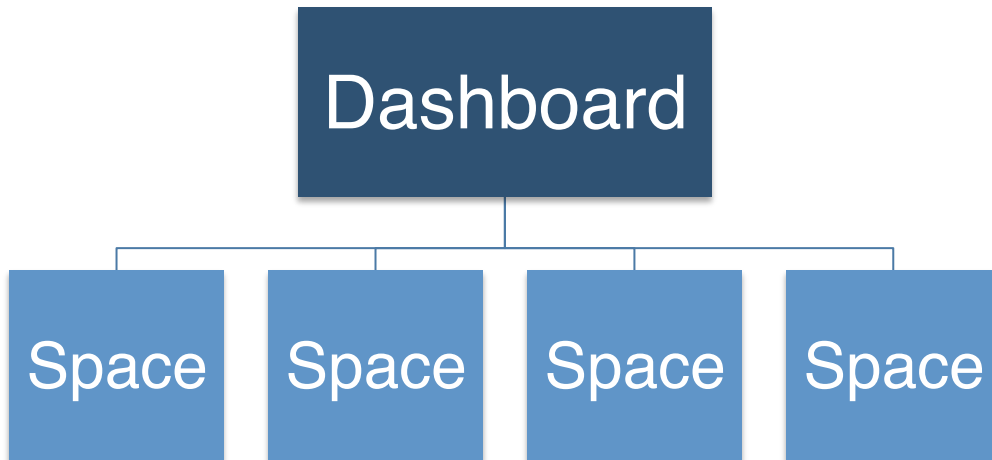
- Partner Access
- Developer API Portal

Basic Navigation

The screenshot displays the Confluence dashboard interface. At the top, there is a navigation bar with the Confluence logo, 'Spaces', 'People', and a 'Create' button. On the right side of the bar are icons for search, help, settings, a laptop, and a user profile. Below the navigation bar, the dashboard is divided into two main sections: 'Dashboard' and 'Recent activity steam'. The 'Dashboard' section on the left includes a 'Welcome to Confluence' message, a 'Get started' section with three tasks: 'Create a new space and start creating content.', 'Invite your colleagues to join you in Confluence.', and 'Upload your picture and edit your profile.'. Below this is a 'Site Spaces' section with tabs for 'Spaces', 'Pages', and 'Network', and a 'Create Space' button. The 'Recent activity steam' section on the right has tabs for 'Popular', 'All Updates', 'Favourite Spaces', 'Network', and 'Space Categories'. It lists recent updates from 'cPrime Administrator' and 'Unknown User (mswansegar)', including items like 'Sample Requirements Page', 'Re: Sample Requirements Page', and 'Service Desk Knowledge Base'. Buttons for 'Invite Users' and 'Create Space' are located at the top right of the activity stream.

Content organized by spaces,
Favorite pages and people you are following

Building Blocks: Spaces



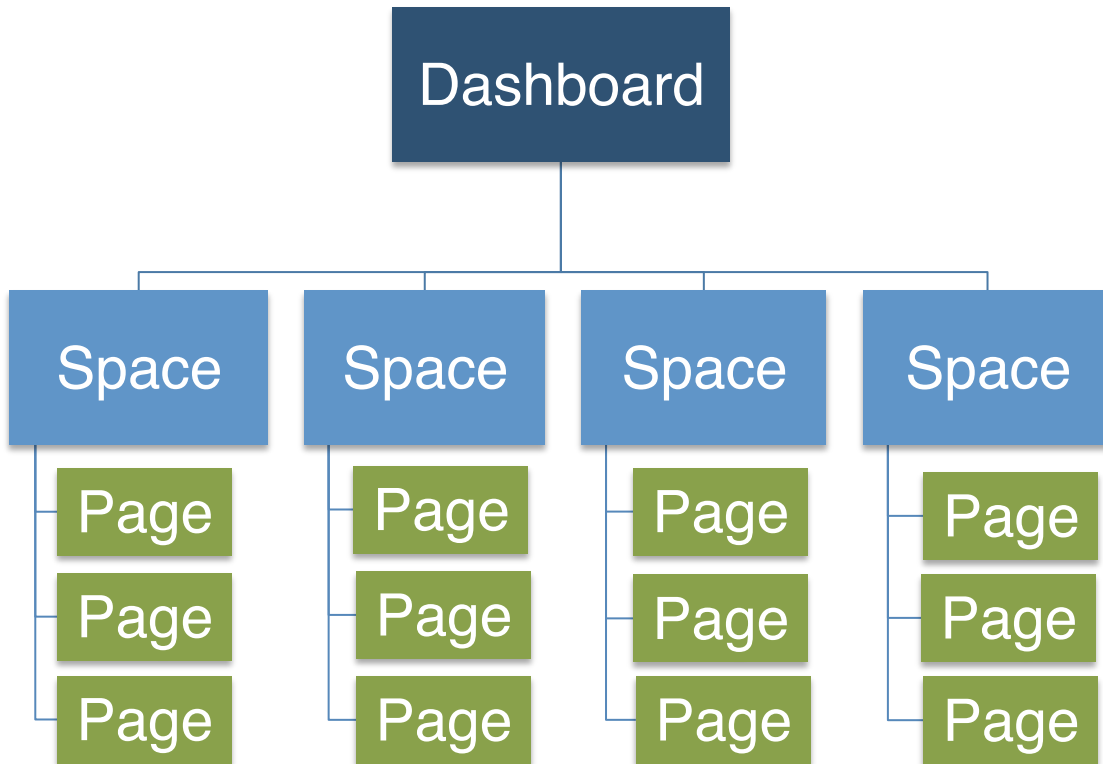
Space Administrator Tools:

- Create Space
- Edit Space Details
- Delete Space
- Archive Space
- Grant Permissions
- Look and Feel
- Sidebar configuration
- View Space Activity
- Export space

Space User Tools:

- View Space
- Add Pages

Building Blocks: Pages



Space Administrator Tools:

- Restore Trashed Pages

Space User Tools:

- Create Page
- View/Edit Page
- Delete Page
- Copy Page
- Set Page Restrictions
- Export pages
- Page History and Versions
- Page links
- Page labels
- Add Attachments
- Watch Page
- Search Page content
- Re-order pages

Go public or keep it private -
the choice is yours

Building Blocks: Content

What can I put on a page?

Images
Bookmarks
Attachments
Comments
Labels
Charts
RSS Feeds
Videos
Diagrams
Spreadsheets
@ Mentions
JIRA Issues



Content

+ Content

Space User Tools:

- Layout
- Advanced Formatting
- Page or Content References
- Anchors

+ More Content

Page Operations

- Confluence Page is an artifact that captures information relevant to a team's knowledge and collaboration
- Operations Available are:
 - Create -> View/Edit/Move/Copy Page
 - Attach files
 - Add Labels
 - Manage Permissions
 - Track Versions
 - Collaborate -> Share/Watch/Favorite/Export/Short Link/Comment

Page Operations



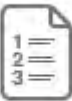





Your page will be a child of this page

The space where you are creating your page

Create [Help](#)

Select space

Parent:

-  **Blank page**
Start with a blank page.
-  **Decision**
Record important project decisions and communicate them with your team.
-  **How-to article**
Provide step-by-step guidance for completing a task.
-  **Meeting notes**
Plan your meetings and share notes and actions.
-  **Blog post**
Share news and announcements with your team.
-  **File list**
Upload, preview and share files with your team.
-  **JIRA report**
Communicate JIRA information in easy to read reports.
-  **Product requirements**
Define, track and scope requirements for your

[Add or customise templates for the selected space](#)

Available templates and blueprints

Create Page

The screenshot shows the Confluence 'Create Page' interface. At the top, there is a navigation bar with 'Confluence', 'Spaces', 'People', and a 'Create' button. Below this is a rich text editor toolbar with various icons for text formatting and content insertion. The main content area is a large text box. At the bottom, there is a footer bar with options for 'Unrestricted', 'Labels', and 'Location', and a 'Preview', 'Save', and 'Close' button area.

1 Define Page Title

2 Add Content

3 Preview, Save, or Close

Edit Page Restrictions,
Labels, and Locations

Preview, Save, or Close
Note: A Draft is auto-saved

View/Edit Page

Confluence header

Confluence header

Pages

Confluence Spaces People Create

Pages

Blog

SPACE SHORTCUTS

Here you can add shortcut links to the most important content for your team or project. [Configure sidebar](#).

PAGE TREE

- What is Confluence? (step 1 of 9)
- A quick look at the editor (step 2 of 9)
- Let's edit this page (step 3 of 9)
- Prettify the page with an image (step 4 of 9)
- Get serious with a table (step 5 of 9)
- Lay out your page (step 6 of 9)
- Learn the wonders of autoconvert (step 7 of 9)
- Tell people what you think in a comment (step 8 of 9)

1. What is Confluence?

2. A quick look at the editor

3. Let's edit this page

4. Prettify the page with an image

5. Get serious with a table

Edit Watch Share

Sidebar for accessing pages,
the blog, and administering the space

Edit the page
Watch it to get updates
Use Tools for more options

Copy Page

The screenshot shows the Confluence user interface. At the top, there is a navigation bar with 'Confluence', 'Spaces', 'People', and 'Create' buttons. Below this is a sidebar for 'Demonstration Space' containing 'Pages', 'Blog', and 'SPACE SHORTCUTS'. The main content area displays a page titled 'What is Confluence? (step 1 of 9)' created by 'Anonymous' on 'Feb 21, 2015'. The page content includes a paragraph: 'Confluence is a collaboration tool where you can create and share content with your team. You might use Confluence to write and discuss meeting notes, project plans, requirements, how-to guides, or anything else you can think of.' followed by a sub-section 'So let's try it!' with a link to 'Click here to learn how to edit a page'. At the bottom of the page are 'PREV', 'HOME', and 'NEXT' navigation buttons. A context menu is open on the right side of the page, listing various actions such as 'Attachments (0)', 'Page History', 'Restrictions', 'Favourite', 'Page Information', 'Resolved comments (0)', 'Link to this Page...', 'View in Hierarchy', 'View Source', 'View Storage Format', 'Export to PDF', 'Export to Word', 'Import Word Document', 'Copy', 'Move', and 'Delete'. The 'Copy' option is highlighted with a blue background and an orange arrow points to it from the bottom right.

Create a copy of existing page.
Edit name and content as
necessary.

Move/Re-Order Page

Move Page – 'What is Confluence?' (step 1 of 9)

Help

Advanced

Search

Recently Viewed

Browse

Specify the new parent page for this page and its children by space and title.

New space:

New parent page:

Start typing a page title to see a list of suggestions.

2

If different, enter new space or new parent page

Current location: [Demonstration Space](#) > [Welcome to Confluence](#)

New location:

3

Reorder

Watch

- Attachments (0)
- Page History
- Restrictions
- Favourite
- Page Information
- Resolved comments (0)
- Link to this Page...
- View in Hierarchy
- View Source
- View Storage Format
- Export to PDF
- Export to Word
- Import Word Document
- Copy
- Move**
- Delete

1

Move page to new space, new parent Page, or to re-order pages

Check Reorder to enable page to be re-positioned after move

Attach Files to Page

The screenshot displays the Confluence interface for attaching files to a page. On the left, the 'Attachments' section shows 'There are currently no attachments on this page.' Below this is the 'Attach Files' section, which includes an 'Upload file' area with a 'Browse...' button, a 'Comment' text box, an 'Attach more files' link, and an 'Attach' button. A large dashed box with a downward arrow and the text 'Drop files here to attach them' is positioned to the right of the upload area. On the right side of the page, a dropdown menu is open, showing options such as 'Attachments (0)', 'Page History', 'Restrictions', 'Favourite', 'Page Information', 'Resolved comments (0)', 'Link to this Page...', 'View in Hierarchy', 'View Source', 'View Storage Format', and 'Export to PDF'. Two callout boxes with numbers '1' and '2' are present: '1' points to the 'Attachments (0)' menu item, and '2' points to the 'Attach more files' link.

Browse to select files or Drag and Drop

View attachments
on page
Click to attach
more files

Add Labels to Page

Let's play with some content. Don't worry, you won't break anything:

1. Click **Edit** at the top of this page. Now you are in the editor.
2. Type some words in the panel below this one.
3. Have some fun:
 - Change the color of some text: Select the text, then choose a color from the color option in the editor tool bar.
 - Add a link: Select some text, then choose the **Link** button on the toolbar.

Labels [Help](#)

Create new label

pages x

View existing labels
Enter name for new label and Add

Shortcut tip: In page view, pressing l also opens this dialog box [Close](#)

PREV HOME NEXT

Like Be the first to like this

pages

View existing labels
Click pencil icon to
add new labels

Manage Permissions for Page

Page Restrictions Help

Restrict viewing Restrict editing

To: Me Person... Group... Restrict

No view restrictions are defined

No edit restrictions are defined

Save Close

/atch Share ...

- Attachments (4)
- Page History
- Restrictions**
- Favourite
- Page Information
- Resolved comments (0)
- Link to this Page...
- View in Hierarchy
- View Source
- View Storage Format
- Export to PDF
- Export to Word
- Import Word Document
- Copy
- Move
- Delete

- View existing restrictions
- Set viewing and/or editing restrictions by Person or Group
- Remove existing restrictions

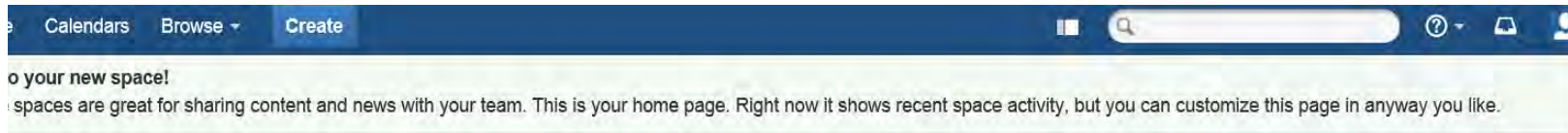
Add Favorite or Watch Page

Watch a page to stay informed
on any page activity

The screenshot shows the Confluence interface for a page titled "What is Confluence? (step 1 of 9)". The page content includes an introduction to Confluence as a collaboration tool and instructions on how to create and edit pages. The interface features a top navigation bar with "Spaces", "People", and "Create" buttons. On the right side of the page, there are buttons for "Edit", "Watch", and "Share". A dropdown menu is open from the "Watch" button, showing options such as "Attachments (0)", "Page History", "Restrictions", "Favourite", "Page Information", "Resolved comments (0)", "Link to this Page...", "View in Hierarchy", "View Source", "View Storage Format", "Export to PDF", "Export to Word", "Import Word Document", "Copy", "Move", and "Delete". Two orange arrows point to the "Watch" button and the "Favourite" option in the dropdown menu. Below the page content, there are buttons for "PREV", "HOME", and "NEXT".

Mark a page as Favorite to
find it quickly on dashboard

Comment on Page



These tasks to get started

- Customize your home page** - Click *Edit* in the top right of this screen to customize your Space home page
- Make your first page** - Click the *Create* button in the header to get started
- Configure your Space** - Click *Configure Sidebar* in the left panel to update space details and logo
- Manage permissions** - Click *Space Tools* in the left sidebar to update permissions and give others access

Recent activity

- Swati Jain**
Client Inquiry Process Flow updated yesterday at 4:19 PM • [view change](#)
- Swati Jain**
Client Inquiry Process Flow commented yesterday at 4:11 PM
- Capital Group - Training Plan** updated May 22, 2015 • [view change](#)
- Business Requirements Doc - Sample** updated May 21, 2015 • [view change](#)

Space contributors

- [Swati Jain](#) (19 hours ago)
- [Stanley Florek](#) (8 days ago)
- [Brandon Huff](#) (9 days ago)
- [Chris Shim](#) (26 days ago)
- [Simone Chen](#) (27 days ago)
- ...

4 Comments



Stanley Florek

Swati, I have gotten in to this page and can see the diagram and photo you posted. Nice work so far.

[Reply](#) • [Like](#) • Apr 16, 2015



Write a comment...

Add Rich Text comments to collaborate on documents

Page Link

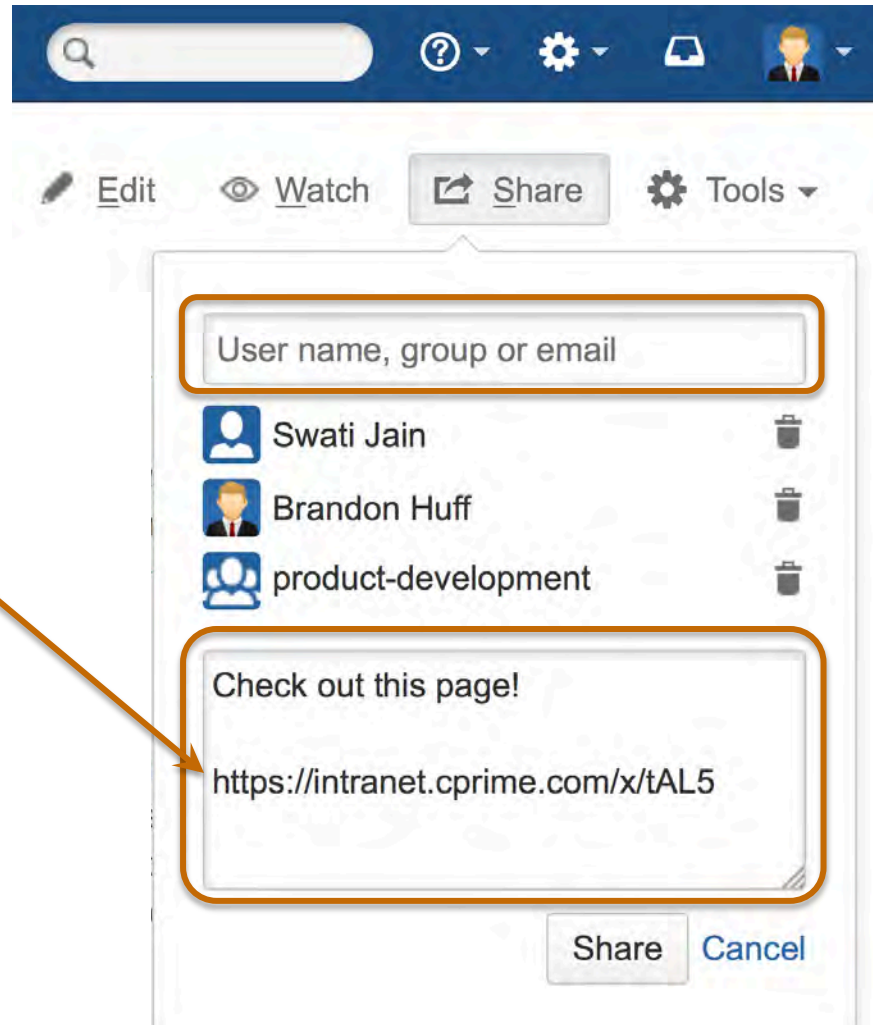
The screenshot shows a software interface with a dark blue header bar containing search, help, settings, and user icons. Below the header, there are buttons for 'Edit', 'Watch', and 'Share', followed by a three-dot menu icon. The 'Link to this Page' dialog box is open, displaying the following information:

- Link: <https://intranet.cprime.com/display/PM>
- Tiny Link: <https://intranet.cprime.com/x/tAL5>

A 'Close' button is located at the bottom right of the dialog box. A 'Shortcut tip' at the bottom left states: 'Shortcut tip: Pressing k also opens this dialog box'. The context menu is open, listing various actions such as 'Attachments (0)', 'Page History', 'Restrictions', 'Favourite', 'Page Information', 'Resolved comments (0)', 'Link to this Page...', 'View in Hierarchy', 'View Source', 'View Storage Format', 'Export to PDF', 'Export to Word', 'Import Word Document', 'Copy', 'Move', and 'Delete'. The 'Link to this Page...' option is highlighted in blue. An orange arrow points from the 'Link to this Page...' menu item to the 'Tiny Link' field in the dialog box.

Find Tiny URL to page by clicking here. Short link useful for distribution.

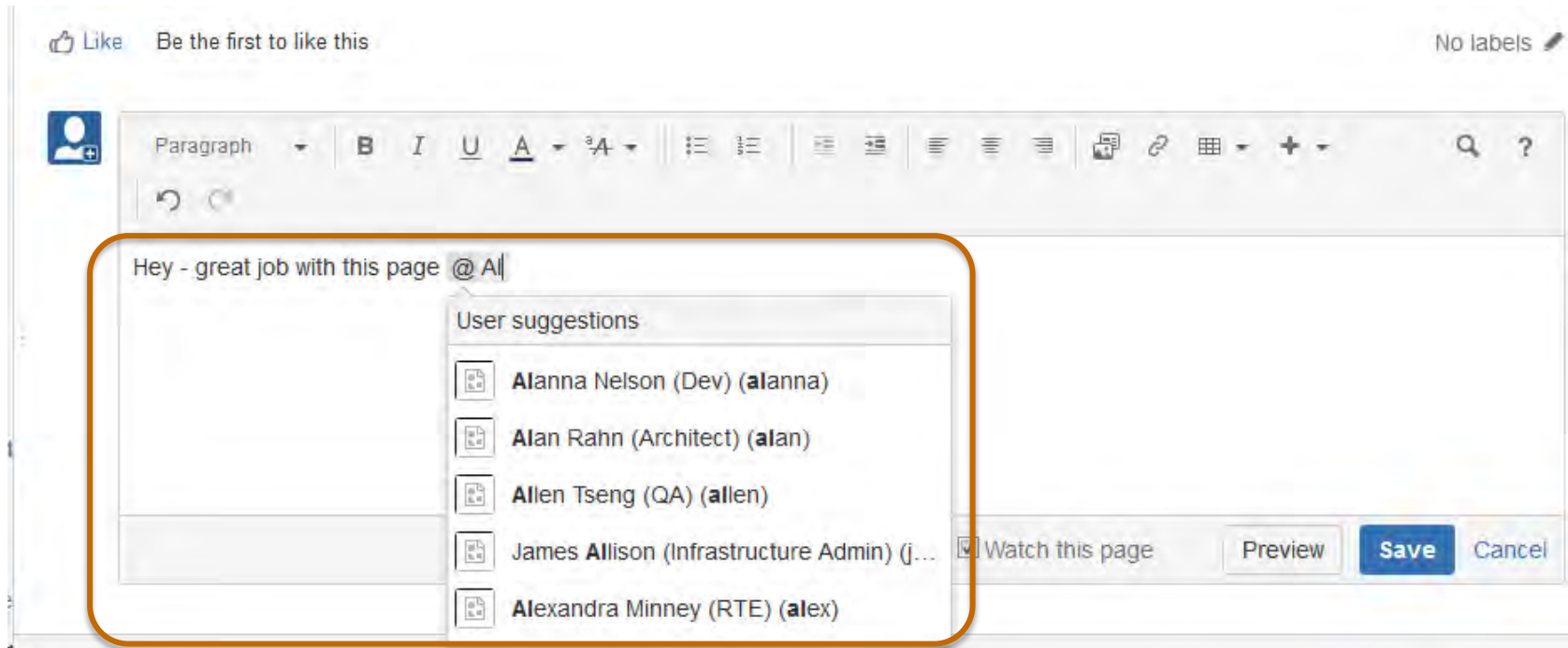
Sharing your Page



Share page with other Confluence users by dropping the page link in user's inbox

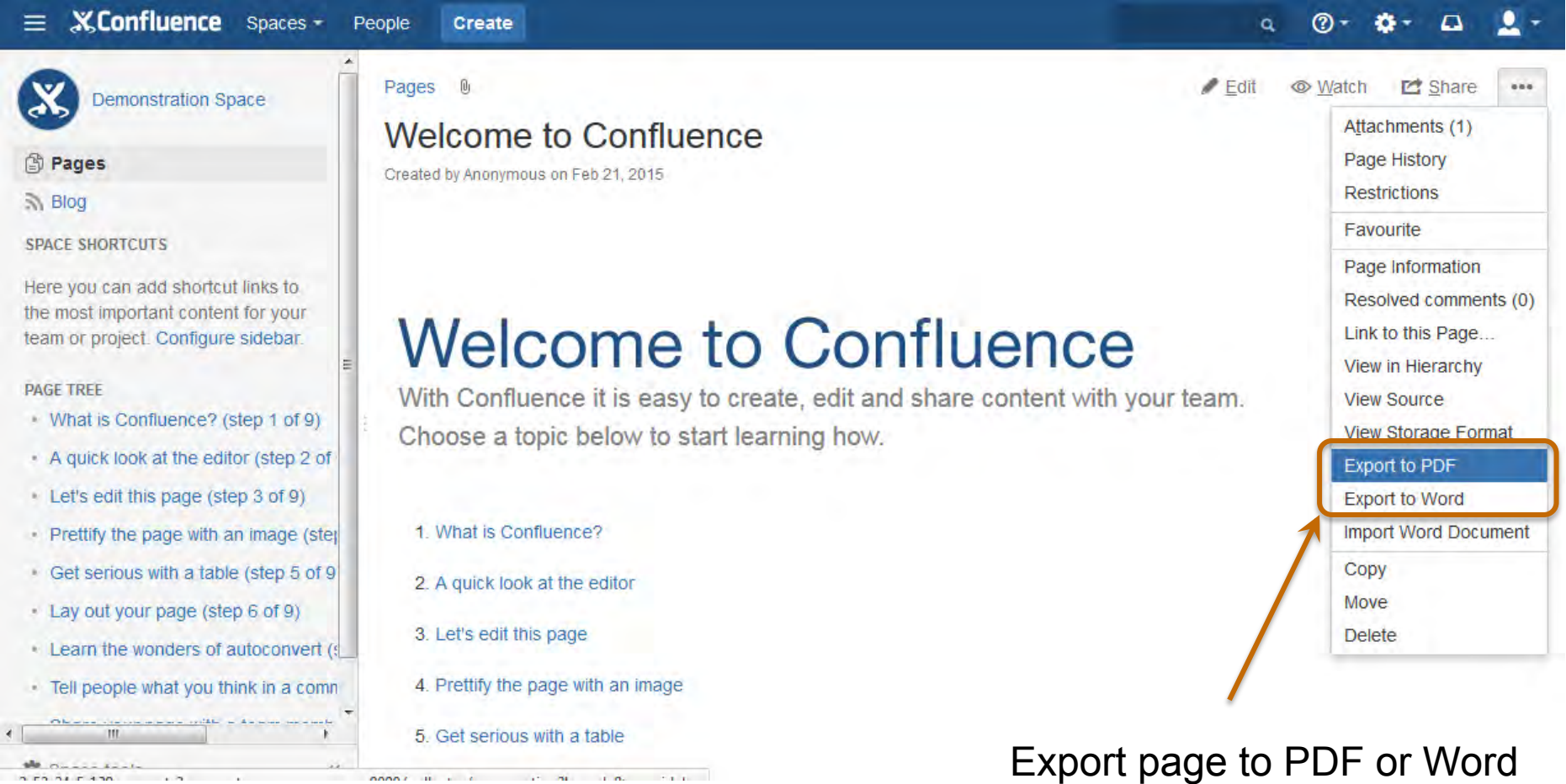
Sharing with @ mentions

Share and notify users of page comments
Mention user on a page (edit page) or in a comment



Format: @ username
Page link will be dropped in user's inbox.

Export Page



Export page to PDF or Word to archive and distribute

Page Version Control

2

Compare selected versions

Version	Date	Restore to any previous version
<input type="checkbox"/> CURRENT (v. 4)	Apr 26, 2013 13:53	Rach Admin [Administrator]: Fixed a typo
<input type="checkbox"/> v. 3	Apr 26, 2013 13:53	Leah Admin Restore this version · Delete
<input type="checkbox"/> v. 2	Apr 26, 2013 13:52	Josh User: (Added note about changes) Restore this version · Delete
<input type="checkbox"/> v. 1	Apr 26, 2013 11:56	Rach Admin [Administrator] Restore this version · Delete

Select any two versions to compare

1

View Page

- Attachments (0)
- Page History
- Restrictions
- Page Information**
- Link to this Page...
- View in Hierarchy
- View Source

Select Page Information to find Version History and other useful information about the page.

3

Versions Compared	Key
6 Administrator less than a minute ago	This line was added.
Current Administrator less than a minute ago	This line was removed.
	Formatting was changed.

View Page History

Add this line.

~~Remove this line.~~

Reformat this line.

Search Content

The image shows a search interface with a search bar at the top containing the text "train". A dropdown menu is open below the search bar, listing several search results. A red box labeled "1" highlights the search bar, and another red box labeled "2" highlights the search results area. The search results area shows a list of search results, including "Coach/Trainer feedback", "Tools Team Cross-Training", "cPrime Consultant Playbook(1).docx", "The Capital Group - Training Plan CLIENT DRAFT", "cPrime-Enterprise-Agile-Transformation-1pg(1).pdf", and "The Capital Group - Training Plan Internal Working Copy".

1 tra

- Backup Administration
- Tools Training
cPrime Customer Implementations
- 2.3 Agile Board Transition
cPrime Customer Implementations
- 2.2 Project Transition
cPrime Customer Implementations
- 2.1 Transition steps to implement the JIRA ...
cPrime Customer Implementations
- Search for 'tra'

2 Search results

Page 1 of 18. Showing 180 results (0.046 seconds)

- Coach/Trainer feedback**
Location Note any issues with or perks of the classroom/building/area. Logistics Note any specific issues with logistics at this location such as delivery difficulties, parking issues, etc Team/Class Note specifics about the team or class such as job type...
Agile Practitioners • Nov 11, 2013
- Tools Team Cross-Training**
Hi All, Here are the topics we identified as important for Tools team to cross-train in. It's consolidated from my individual interviews with each of you. For Friday's 4...
Tools • Jul 16, 2014
- cPrime Consultant Playbook(1).docx**
cPrime Consultant Playbook Introduction and Purpose cPrime employs many consultants to train, coach, and otherwise assist our clients with improving their project-management...
People Programs / ... / Onboarding - Consultants • Oct 21, 2013
- The Capital Group - Training Plan CLIENT DRAFT**
train-the-trainer approach for around 40-70 users. While most of these are application users, some others are project leads/admins who may need in depth understanding of some...
Engagements • about 7 hours ago
- cPrime-Enterprise-Agile-Transformation-1pg(1).pdf**
configuration, consulting & implementation services to help train the teams and optimize the tools so that teams can operate at their maximum efficiency. Foundational Planning...
People Programs / ... / Onboard Revamp • Feb 23, 2015
- The Capital Group - Training Plan Internal Working Copy**
. Client is taking train-the-trainer approach for around 20-30 users. While most of these are application users, some others are project leads/admins who may need in depth...
Engagements • about 7 hours ago

BY
Author

SPACE
All spaces
 Search archived spaces

LAST MODIFIED
Any date
Last 24 hours
Last week
Last month
Last year

TYPE
All Content
Pages
Blog Posts

Advanced search options

Quick Search will Autocomplete your entries

Add Inline Comments on Page



a between **the original ticket** creation timestamp
any delays to be made easily visible. This appe:

When content is selected, a comment
icon will appear to add inline comments

- **SLAs Miscaptured:** if the Support Intake Systems email to JIRA is delayed in a substantial way, there will be a wide delta between **the original ticket** creation timestamp and the JIRA one. There is no create date explicitly sent in the email template, but if there was we could at least capture that in JIRA so any delays to be made easily visible. This appears to be an existing risk in the business process today, and would not represent a risk introduced by JIRA.
- **Obsolete Team Data in JIRA:** Look Up Data will be retrieved from Client Team Service database for initial data retrieval. Once retrieved, these values will be stored and captured in JIRA fields. Any changes to these values will need to be maintained manually in the event of org changes. Bulk Change functionality may be used to make bulk data updates.

2

▼ ▲ ×
cPrime Administrator
Please define where original ticket is coming from for additional clarity.
Save

Enter comments into the comment and save

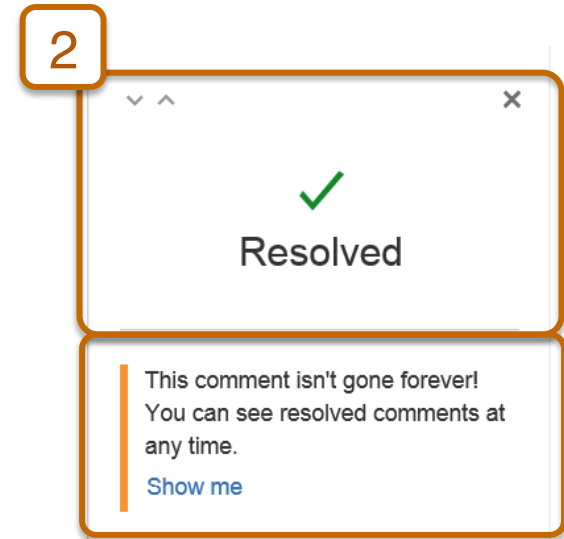
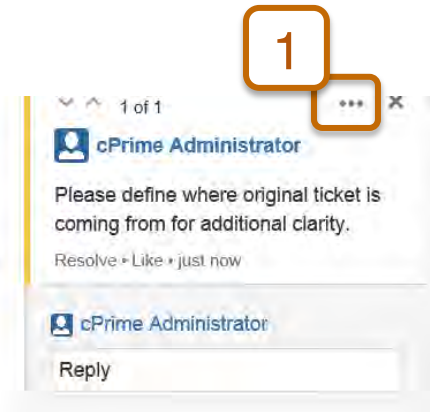
Note: Text will appear highlighted until comment has been marked as resolved

Resolve Inline Comments on Page

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Click on the Options menu to edit, comment, delete, or resolve the comment

Resolved comments can be found under the Page Tools menu



Summary: Confluence Fundamentals

- Understand Confluence structure and organization
- Confluence Space and Page basics
- Learn how to create, edit, and copy pages
- Many page operations available to support collaboration



- Basic Navigation
- Creating and Editing a Page
- Copying a Page
- Attaching files
- @ Mentions
- Export a Page
- Page Version Control
- Inline comments



Online Resources

Resource	Location
Confluence User's Guide	https://confluence.atlassian.com/display/DOC/Confluence+User+%27s+Guide
Confluence Spaces	https://confluence.atlassian.com/display/DOC/Spaces
Confluence Pages	https://confluence.atlassian.com/display/DOC/Pages+and+Blogs

Thank you!