# Confluence Fundamentals Course

Objectives

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

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What is Confluence?

- Confluence is an enterprise wiki that allows content collaboration

Confluence is an *enterprise wiki*

An enterprise wiki helps an organization collaboratively collect, organize and share information

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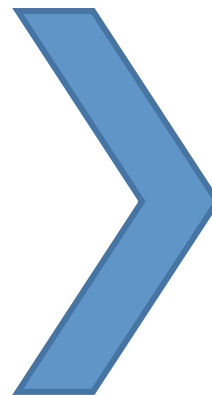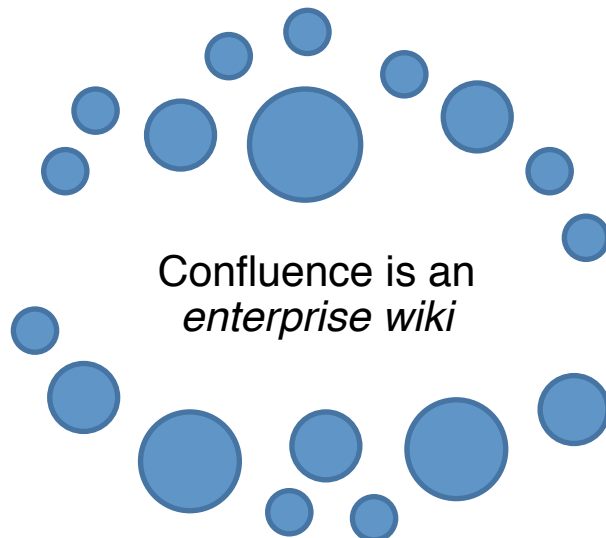
Confluence as an Enterprise Wiki

- 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.)

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Common Use Cases

External
- Website
- Technical/FAQ Documentation

Internal
- Organizational Communication
- Knowledge Base

Hybrid
- Partner Access
- Developer API Portal

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Basic Navigation

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

Building Blocks: Spaces

```
          ┌─────────────────┐
          │   Dashboard     │
          └────────┬────────┘
     ┌───────┬─────┴─────┬───────┐
  ┌──────┐ ┌──────┐ ┌──────┐ ┌──────┐
  │ Space│ │ Space│ │ Space│ │ Space│
  └──────┘ └──────┘ └──────┘ └──────┘
```
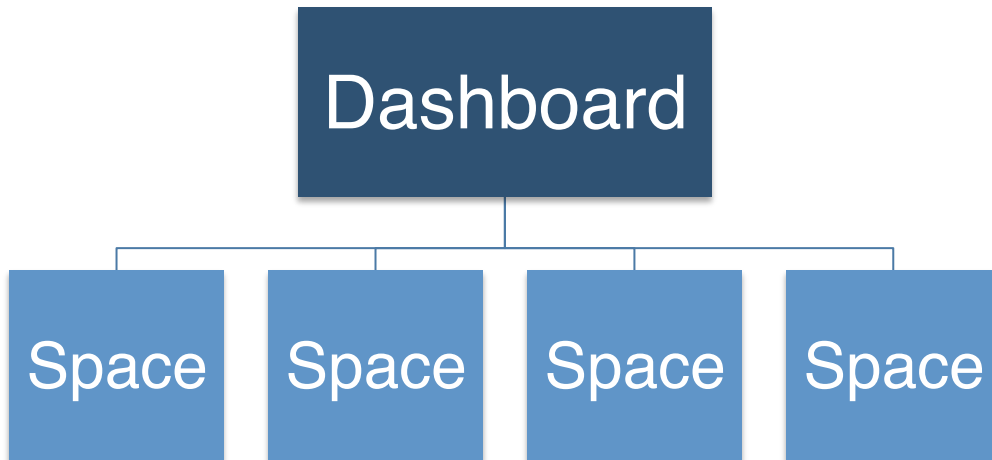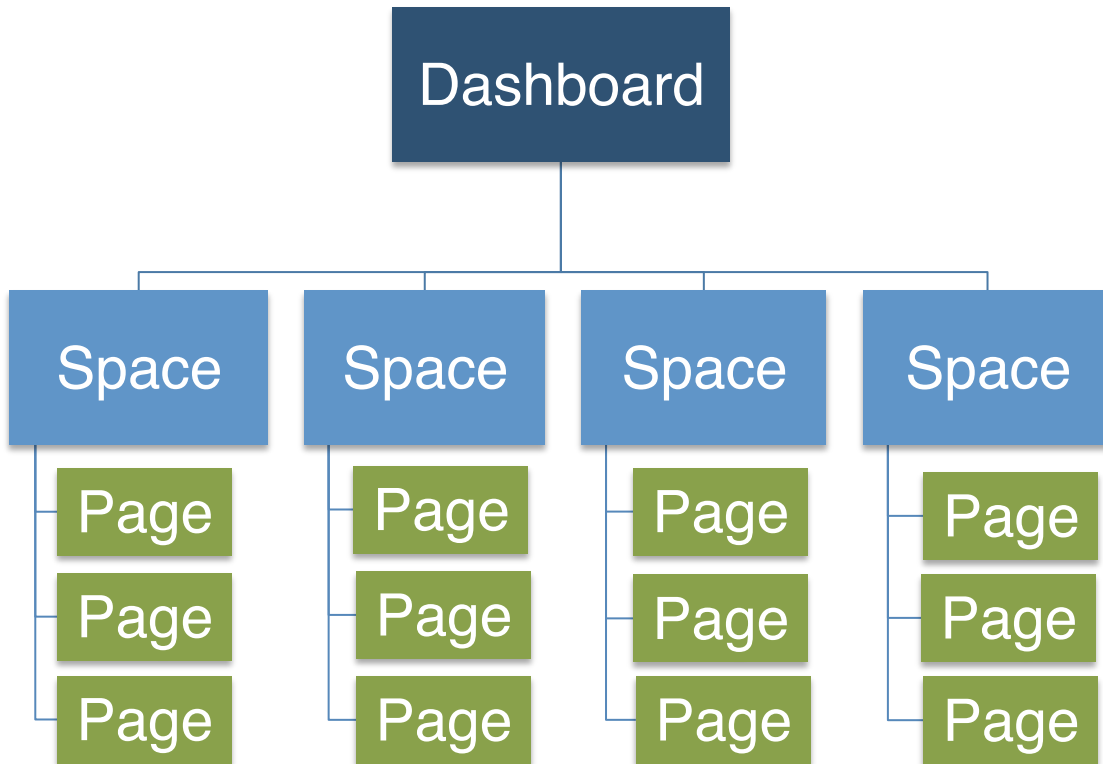
Space Administrator Tools:
- Create Space
- Edit Space Details
- Delete Space
- Archive Space
- Grant Permissions
- Look and Feel
- Sidebar configuration
- View Space Activity
- Export space

Space User Tools:
- View Space
- Add Pages

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Building Blocks: Pages

```
                    ┌─────────────┐
                    │  Dashboard  │
                    └──────┬──────┘
        ┌────────────┬─────┴──────┬────────────┐
    ┌───────┐    ┌───────┐    ┌───────┐    ┌───────┐
    │ Space │    │ Space │    │ Space │    │ Space │
    └───┬───┘    └───┬───┘    └───┬───┘    └───┬───┘
      ┌────┐       ┌────┐       ┌────┐       ┌────┐
      │Page│       │Page│       │Page│       │Page│
      └────┘       └────┘       └────┘       └────┘
      ┌────┐       ┌────┐       ┌────┐       ┌────┐
      │Page│       │Page│       │Page│       │Page│
      └────┘       └────┘       └────┘       └────┘
      ┌────┐       ┌────┐       ┌────┐       ┌────┐
      │Page│       │Page│       │Page│       │Page│
      └────┘       └────┘       └────┘       └────┘
```

Go public or keep it private -
the choice is yours

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

Building Blocks: Content

What can I put on a page?

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

Space User Tools:
- Layout
- Advanced Formatting
- Page or Content References
- Anchors

Content

+ Content

+ 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

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Page Operations
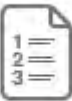
Your page will be a child of this page

The space where you are creating your page

Available templates and blueprints

Create Page

Demonstration Space / Pages / Welcome to Confluence

1 Define Page Title

2 Add Content

Unrestricted · Labels · Location

3 Preview · Save · Close

Edit Page Restrictions,
Labels, and Locations

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

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View/Edit Page

Confluence header

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

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

Copy Page

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: Demonstration Space

New parent page: Welcome to Confluence

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: Demonstration Space › Welcome to ... ence

3

☑ Reorder   Move   Cancel

Watch   ↱ Share   •••

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

1

Copy

Move

Delete

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

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

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Attach Files to Page

Browse to select files or Drag and Drop

View attachments on page
Click to attach more files

Add Labels to Page

View existing labels
Click pencil icon to
add new labels

Manage Permissions for Page

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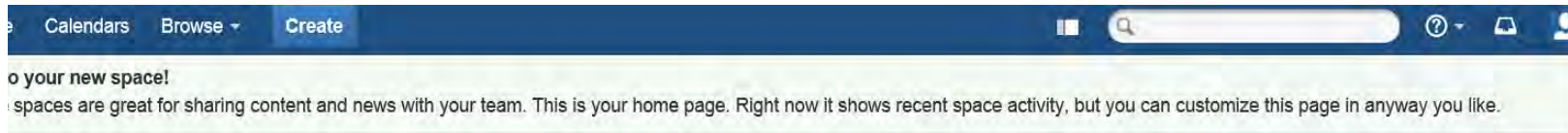- Remove existing restrictions

Add Favorite or Watch Page

Watch a page to stay informed on any page activity

Mark a page as Favorite to find it quickly on dashboard

Comment on Page

Add Rich Text comments to collaborate on documents

Page Link

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

Sharing your Page
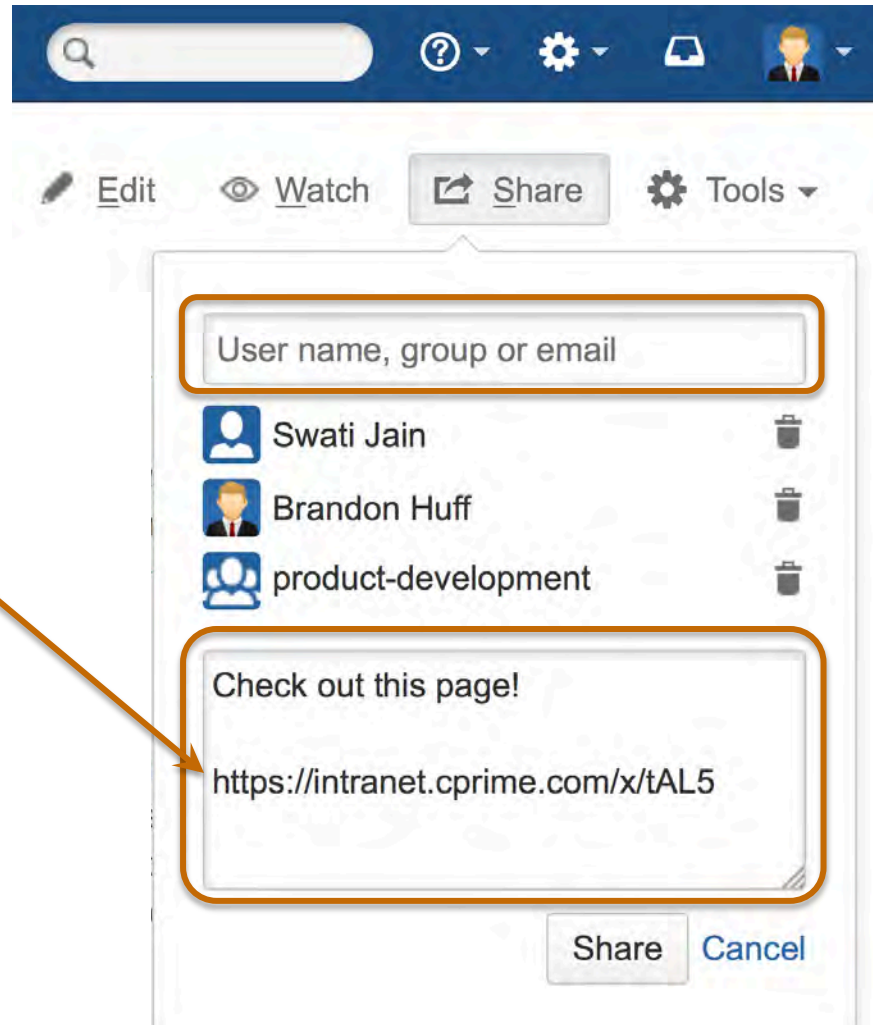
Share page with other Confluence users by dropping the page link in user's inbox
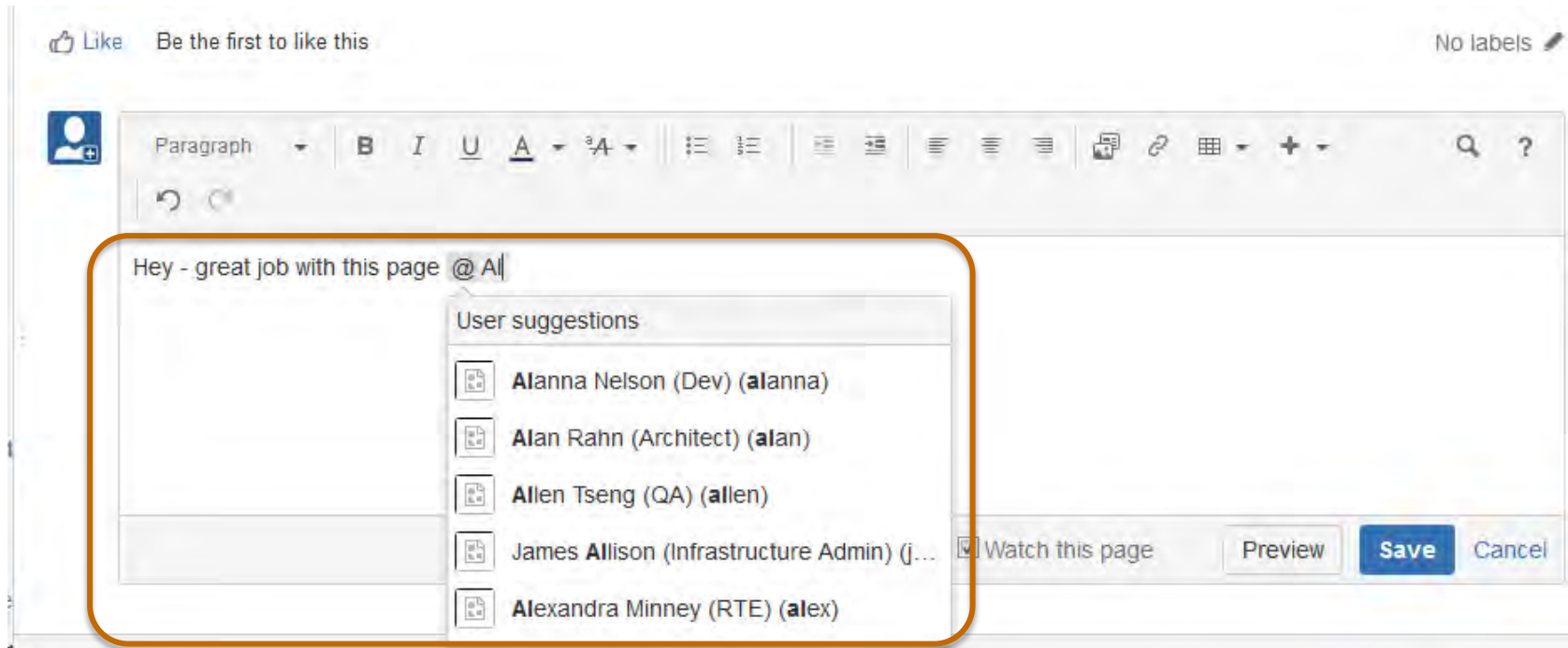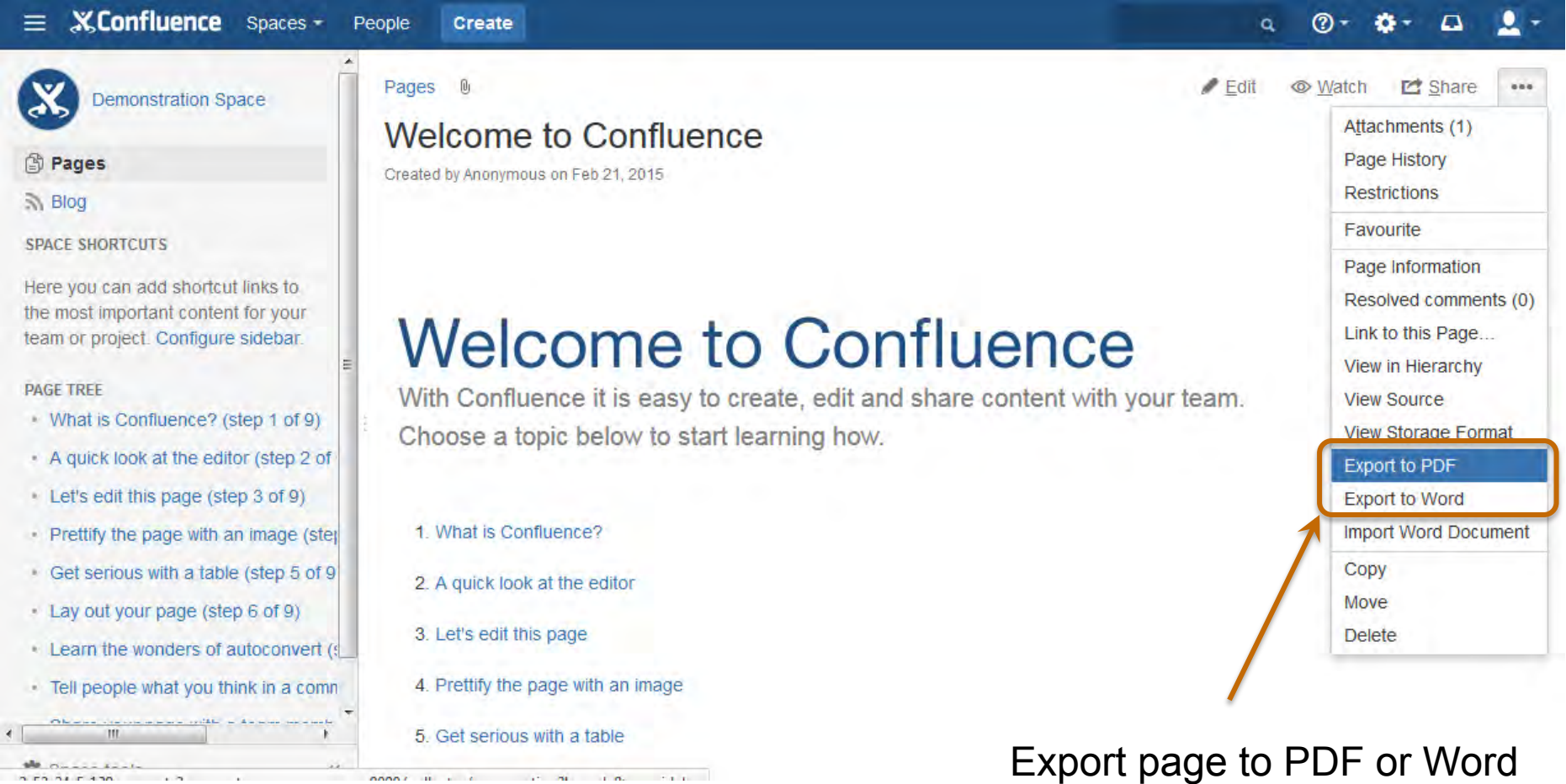
Sharing with @ mentions

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		
☐	CURRENT (v. 4)	Apr 26, 2013 13:53	Rach Admin [Administrator]: Fixed a typo	
☐	v. 3	Apr 26, 2013 13:53	Leah Admin	Restore this version · Delete
☐	v. 2	Apr 26, 2013 13:52	Josh User: (Added note about changes)	Restore this version · Delete
☐	v. 1	Apr 26, 2013 11:56	Rach Admin [Administrator]	Restore this version · Delete

Restore to any previous version

Select any two versions to compare

3

Versions Compared

6 Administrator less than a minute ago	Current Administrator less than a minute ago

Key
This line was added.
This line was removed.
Formatting was changed.

View Page History

Add this line.

Remove this line.

Reformat this line,

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.

Search Content

Quick Search will Autocomplete your entries

Advanced search options

Add Inline Comments on Page

1

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

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

2

- **SLAs Miscaptured:** if the Support Intake Systems email to JIRA is delayed in a susbtantial 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.

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Please define where original ticket
is coming from for additional clarity.
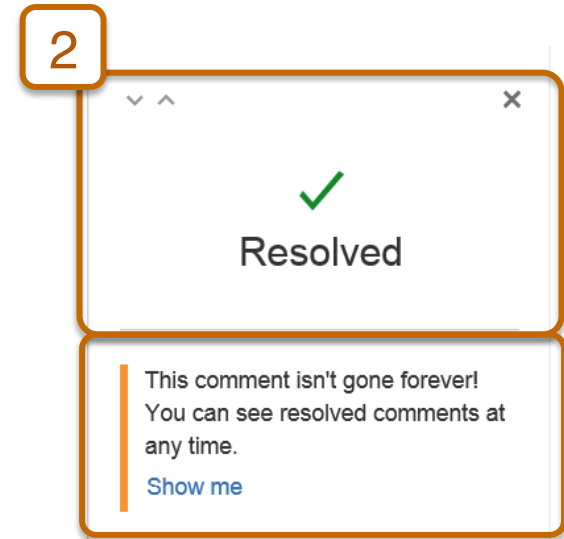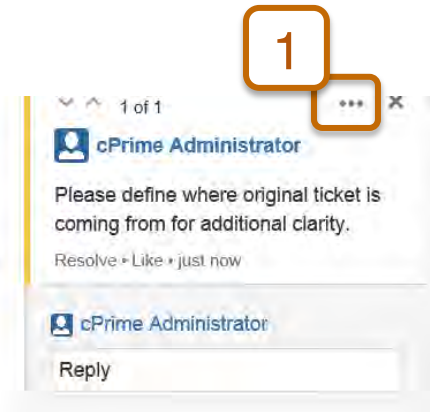
Save

Enter comments into the comment and save

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

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Resolve Inline Comments on Page

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

Demo

- 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

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Thank you!