

A photograph of a woman with dark curly hair and glasses, looking thoughtfully to the side. She is wearing a dark patterned shirt. The background is a blurred office environment.

CONFLUENCE

An abstract graphic element consisting of two curved shapes. On the left is a white, elongated, slightly irregular shape. On the right is a red, more rounded and tapered shape that tapers towards the top right corner of the slide.

A guide to navigating
and using Confluence in
your workplace

Day 1 of 3

Objectives:

By the end of this course, you will be able to:

1. Navigate Confluence
2. Set Up & Manage Spaces
3. Work with Spaces
4. Work with Team Members
5. Configure Spaces



What is Confluence?

Atlassian - The Confluence Company



Confluence is your remote-friendly team workspace where knowledge and collaboration meet.



Confluence is purpose-built for teams that need a secure and reliable way to collaborate on mission-critical projects.

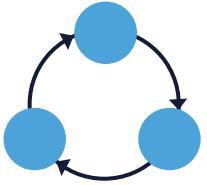


Confluence sites are protected by privacy controls, data encryption, and meet industry-verified compliance standards.



An online application built to help teams organize, create, and discuss their work.

Benefits of Confluence?



An open, connected structure which allows information to flow freely among everyone at the organization.



Built for lasting knowledge so you never lose great ideas or context in a transient notification or chat.



From quarterly planning docs to new hire blogs, everything lives on Confluence.



With social features, employees at every level have a voice to contribute, share, and receive feedback.

Confluence Uses “Spaces”

Your site will be organized into spaces. Most organizations use a mix of team spaces, software project spaces, documentation spaces, and knowledge base spaces:

- Use team spaces to encourage team members to work together toward goals.
- Use software project spaces to keep track of individual initiatives and projects.
- Use documentation spaces to create and organize documentation for your products and services
- Use knowledge base spaces to store and surface answers to common questions.
- Use your personal space as a sandbox to organize your notes, keep track of personal OKRs and goals, and draft proposals for projects before they make it to the roadmap.
- Connect with your team by writing blog posts to introduce yourself or share what you’re working on.



Spaces are collections of related pages that you and other people in your team or organization work on together.

“Spaces”

Know your spaces

Where do I put my own stuff?

How are my spaces organized?

Everything in Confluence is organized in spaces, which are a collection of related pages.

Spaces are made up of pages. Pages are the documents in which your team will create, edit, and discuss work.



Everything your team is working on—meeting notes and agendas, project plans and timelines, technical documentation and more—is located in a space. This is the portal for your team.

In this section you will learn how to Navigate Confluence by:

Navigate the initial start up of Confluence

Create your account and sign in

Manage your personal information and profile

Move from space to space within the Confluence environment

Use the navigation tools at your disposal

Navigate Confluence

Create your Account

To create an account in Confluence, you can either accept an invitation from your company or download it from the Confluence Official Website.

STEP 1: CREATE ACCOUNT

- Go to: [Confluence | Your Remote-Friendly Team Workspace | Atlassian](#)
- Click **Get it Free**

The image shows the Atlassian website header. It includes the Atlassian logo, navigation links for 'Products', 'For teams', and 'Support', a search bar, and user profile icons. Below the header, the 'Confluence' product is highlighted with a dropdown menu. A yellow arrow points from the 'Get it Free' button in the 'Confluence' section down towards the 'Get it free' button in the main 'Get it Free' section of the page.

ATLASSIAN Products ▾ For teams ▾ Support ▾ Buy now Q

Confluence ▾ Get it free

Starting to use Confluence

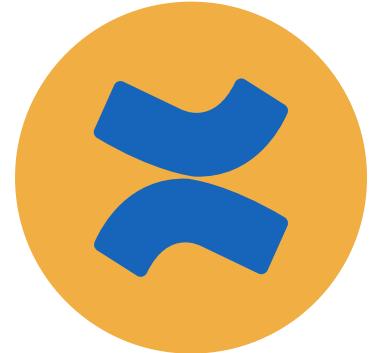
Confluence has an easy start up process.

Once it is downloaded to your computer, all you need to do is to select the icon or you can work from the Cloud by navigating to your account link.



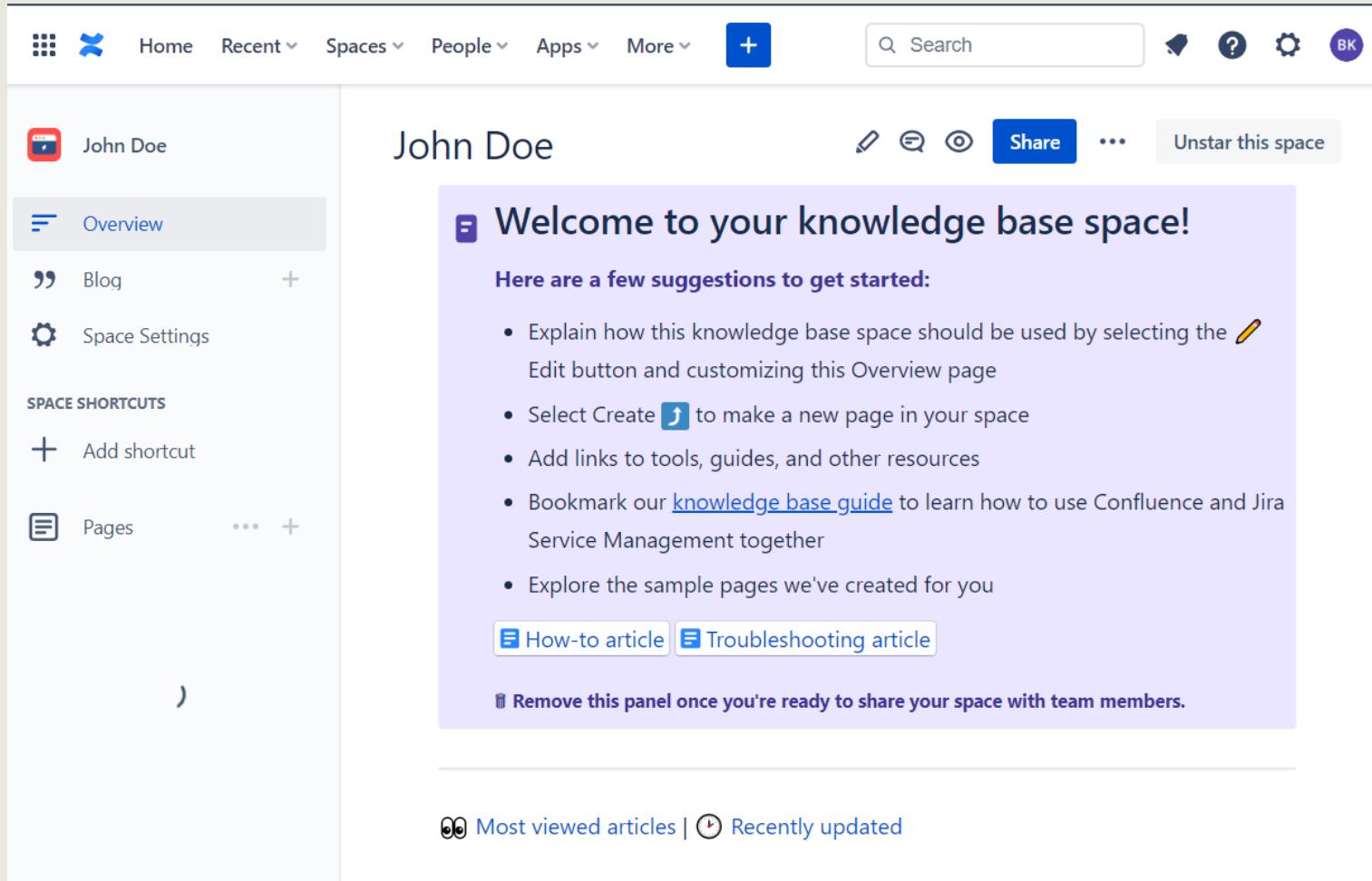
Step 2: (Choose one)

- Select the icon on your desktop
- Navigate to your page link in IE



Navigate the Initial Startup of Confluence

When you first enter the software, there will be a welcome screen.

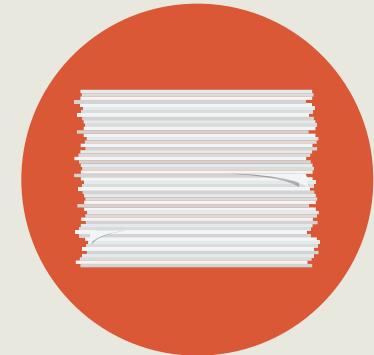


The screenshot shows the initial startup screen of Confluence. At the top, there is a navigation bar with icons for Home, Recent, Spaces, People, Apps, More, a search bar, and various system icons. On the left, a sidebar for user John Doe displays options like Overview (which is selected), Blog, Space Settings, and Page Shortcuts. The main content area is titled "John Doe" and features a purple panel with the heading "Welcome to your knowledge base space!". It contains a list of suggestions:

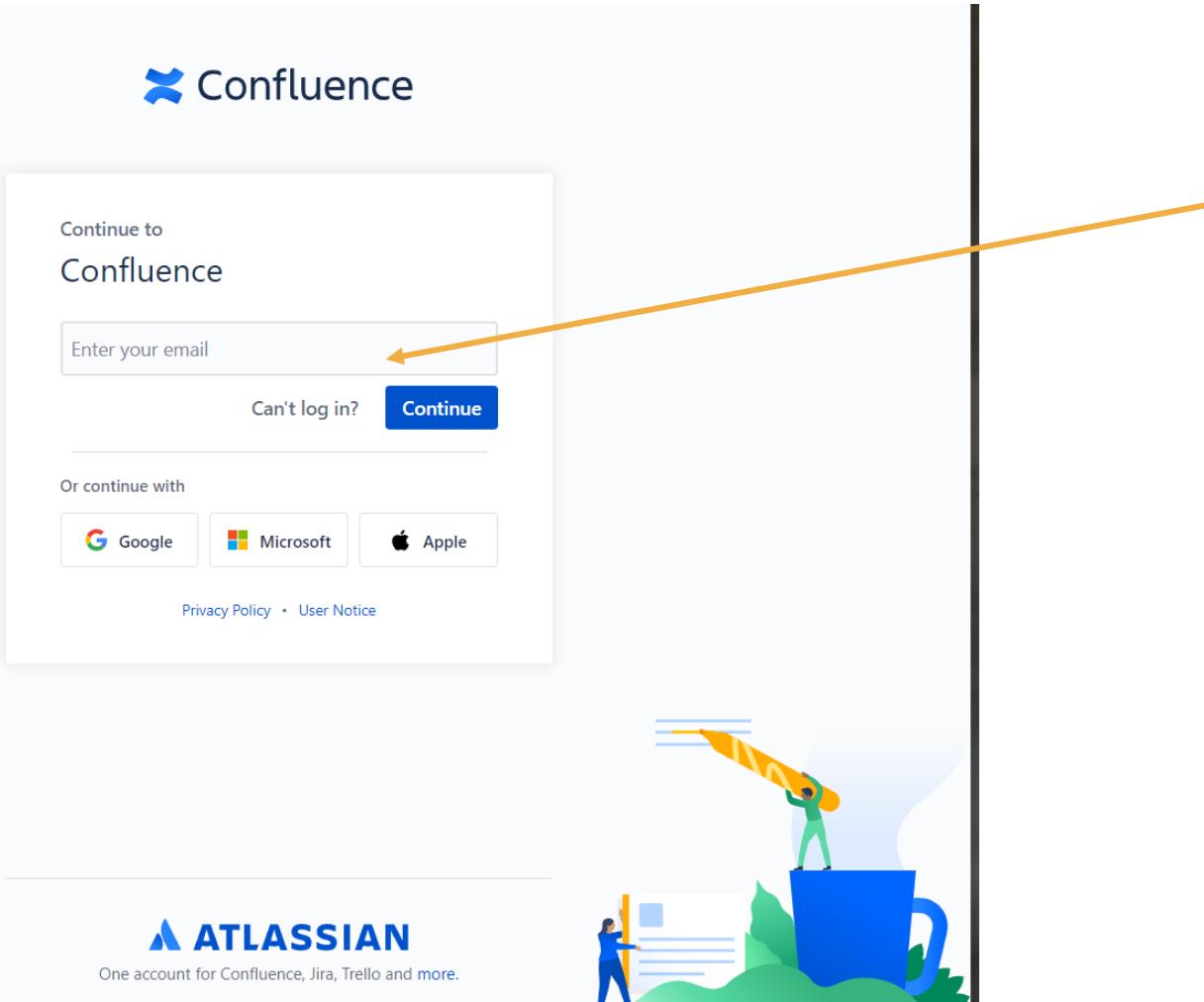
- Explain how this knowledge base space should be used by selecting the Edit button and customizing this Overview page
- Select Create to make a new page in your space
- Add links to tools, guides, and other resources
- Bookmark our [knowledge base guide](#) to learn how to use Confluence and Jira Service Management together
- Explore the sample pages we've created for you

At the bottom of the purple panel, there are two buttons: "How-to article" and "Troubleshooting article". A note at the bottom says "Remove this panel once you're ready to share your space with team members." At the very bottom of the main content area, there are links for "Most viewed articles" and "Recently updated".

After the initial set up, you will need to log in each time you use Confluence.



Sign In



STEP 3: SIGN IN

- Enter email
- Enter password when prompted
- Click **continue**

Manage Your Personal Information

You can manage your personal information such as your job title, department, location, email, and more.

The screenshot shows the Confluence navigation bar at the top with links for Home, Recent, Spaces, People, Apps, More, and a search bar. To the right of the search bar is a blue initials icon (BK). A dropdown menu is open from this icon, containing options: MY CONFLUENCE (Personal Space, Profile, Tasks, Settings, Slack), Log Out, and two yellow star icons. Below the navigation bar, the main content area displays a "Pick up where you left off" section with a list of recent activities (John Doe, Troubleshooting article, How-to article, Decision, Meeting notes) and a "View all" link. On the left, there's a sidebar with sections for Spaces (John Doe) and a "Show more" link.

STEP 4: Manage your Personal Information

Click your Blue Initials Icon

Select Profile in the dropdown

Update the information.

The screenshot shows the "Manage your account" page. It has sections for "ABOUT" (Your job title, Your department, Your organization, Your location) and "CONTACT". The "Profile" option from the dropdown menu in the previous screenshot is highlighted with a yellow box. The "Manage your account" section also has a yellow box around it.

Move from space to space

You can move from space to space within the Confluence environment by selecting the tabs or drop menus. .

The screenshot shows the Confluence Home page with several UI elements highlighted by orange boxes:

- Top Bar:** A navigation bar with icons for Home, Recent, Spaces, People, Apps, More, and a blue '+' button. To the right is a search bar with a magnifying glass icon, followed by icons for notifications, help, settings, and a user profile labeled 'BK'.
- User Profile:** A purple circular icon with the letters 'BK' on it.
- Announcements:** A section with a house icon and the text "Announcements" followed by a right-pointing arrow.
- Discover:** A section titled "Discover what's happening" with two buttons: "Following" (highlighted) and "Popular". To the right is a link "Edit following".
- Followed Content:** A section with a document icon and the text "We've followed spaces and people for you". To the right is a small 'X' icon.

Navigation Tools

You can locate and use the navigation tools to assist you in building and maintaining your page. These tools can take you to your favorite pages and spaces by selecting the **Star**.

The screenshot shows a navigation interface with the following elements:

- Top Bar:** Includes icons for Home, Recent, Spaces, People, Apps, More, a blue plus button, a search bar with placeholder "Search", and user profile icons.
- User Profile:** A purple circular icon labeled "BK".
- Announcements:** A section titled "Announcements" with a right-pointing arrow.
- Discover:** A section titled "Discover what's happening" with "Following" and "Popular" tabs, and a link "Edit following".
- Followed Content:** A section stating "We've followed spaces and people for you" with a close "X" button.
- Left Sidebar:** A vertical sidebar with four icons: a house (Home), a clock (Recent), a star (Spaces), and a document (People). The "House" icon is highlighted with an orange border.

Class Activity Question

Confluence is an online application built to help teams organize, create, and discuss their work.

True or False?

The answer is True!

Questions?

In this section you will learn how to set up and manage spaces by:

Creating new spaces and pages
Structure your information
Control page history, integrations, and user permissions
Optimize space creation with predefined and custom templates

What is a Page?

In a Confluence page, you can create, collect, and access all your content in one place.

Some common pages include:



Rich content

- Images. Just drag and drop.
- Videos. Paste a YouTube or Vimeo URL and watch Confluence “magic” happen. (Other formats are easy to embed, too.)
- Files. Drop in Office docs to embed them into a page.
- Links. Drop in links to other web content—anything within Confluence or across the web.

You can even add functionality.

- Macros let you add more functionality to your pages.
- Macros in Confluence are similar to Excel macros or Google widgets. They add functionality, formatting, and the capability to include dynamic content.

Tracking information

- JIRA issues. Paste the URL of your JIRA issue and its summary, key, and status will automatically be displayed on the page.

Important facts about Pages

They live online.

Everything you create is accessible (if you want it to be) to people on your team.

Use page restrictions.

You control who has access to the pages you create with page restrictions, which means you can set who can view and/or edit your pages.

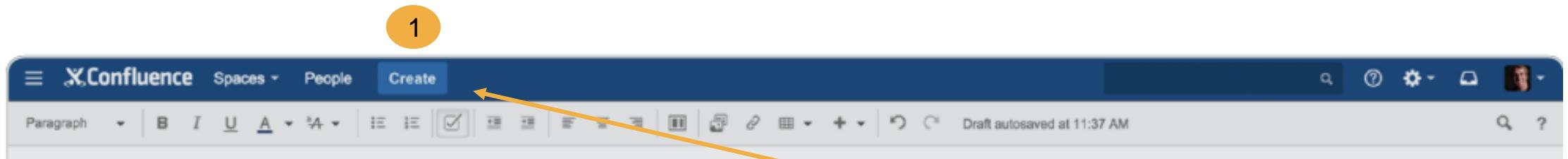
Pages can be nested.

Every page lives in a space, but you can also nest pages in a hierarchy within each space.

Helpful Tip: Start with a Template

If you don't want to start with a blank page, there are a range of templates to give you a head start.

How to Create a Page

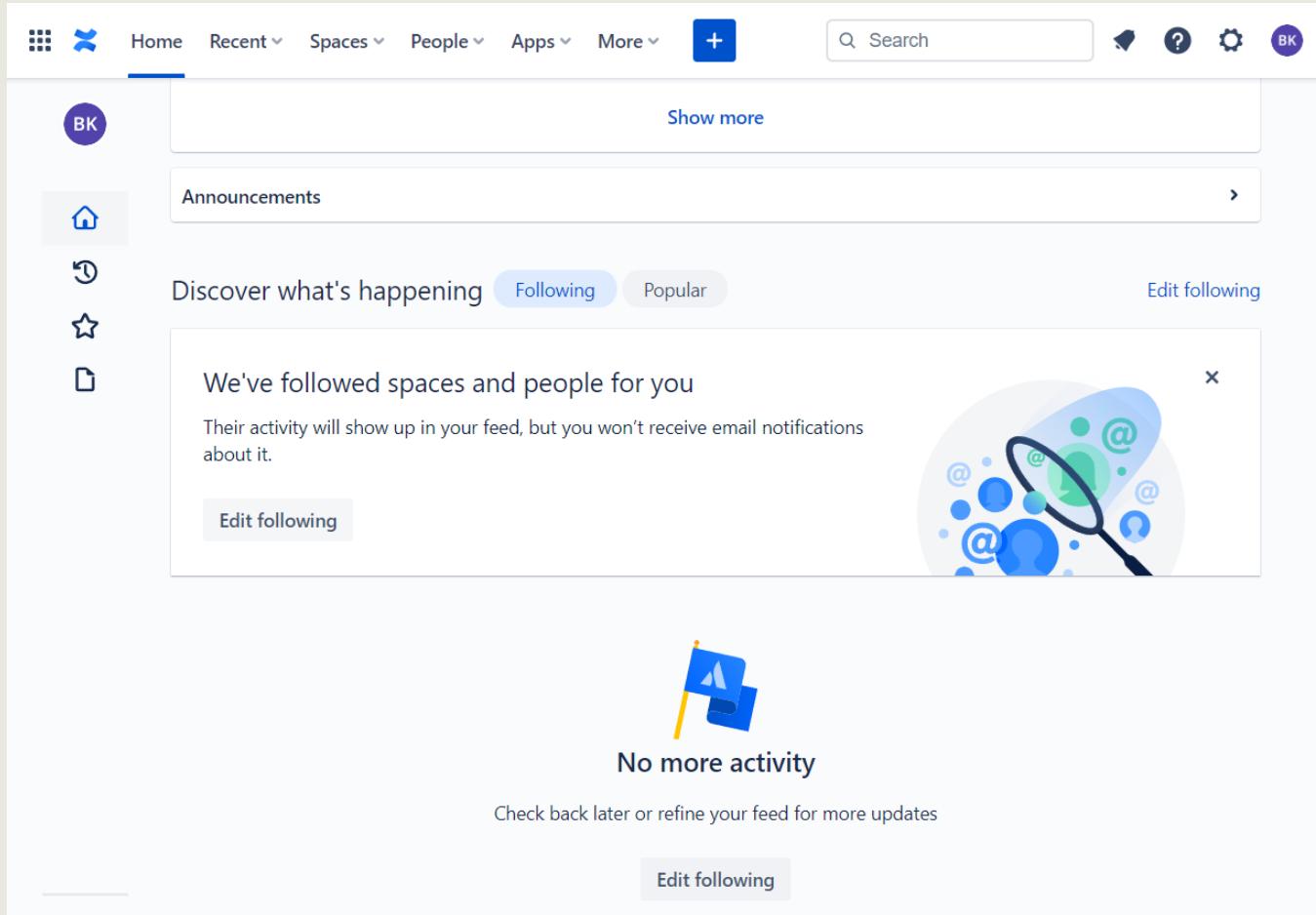


A screenshot of the Confluence 'Create' dialog box. Step 1 is indicated by a yellow circle labeled '1' over the 'Create' button in the header. Step 2 is indicated by a yellow circle labeled '2' over the 'Select space' dropdown menu, which shows 'Mobile Development Team' selected. Step 3 is indicated by a yellow circle labeled '3' over the 'Meeting notes' template option. Step 4 is indicated by a yellow circle labeled '4' over the blue 'Create' button at the bottom right of the dialog.

1. Click the “Create” button
2. Select a space for the page
3. Select the “Meeting Notes” template
4. Click “Create”

Pages vs. Spaces

Once you create a page, you can now add spaces.



The screenshot shows the Atlassian Home page interface. At the top, there is a navigation bar with icons for Home, Recent, Spaces, People, Apps, More, a search bar, and user-specific options like 'BK'. Below the navigation, there are several sections: 'Announcements' (with a house icon), 'Discover what's happening' (with a magnifying glass icon), and a central 'Edit following' section. The 'Edit following' section contains a message: 'We've followed spaces and people for you. Their activity will show up in your feed, but you won't receive email notifications about it.' It includes an 'Edit following' button and a magnifying glass icon over a background of social media symbols. At the bottom, there is a 'No more activity' message with a blue flag icon, a 'Check back later or refine your feed for more updates' link, and another 'Edit following' button.

How do I create a page?

You have a selection of different types of pages you can create.

The screenshot shows the Confluence Dashboard. At the top, there's a navigation bar with 'Confluence', 'Spaces', 'People', and a blue 'Create' button. Below the navigation is a 'Dashboard' section with a 'Welcome to Confluence' message. Underneath is a 'Site Spaces' list containing several project spaces like 'Android Revamp Project', 'Demonstration Space', etc. A yellow circle labeled '1' highlights the 'Create' button in the top right corner of the dashboard area.

The screenshot shows the 'Create' dialog box overlaid on the Confluence Dashboard. The dialog has a 'Select space' dropdown set to 'Mobile Development Team' (highlighted by a yellow circle labeled '2'). Below it, a 'Blank page' option is selected (highlighted by a yellow circle labeled '3'). The dialog also contains other options like 'Blog post', 'Decision', 'File list', 'Meeting notes', 'How-to article', and 'JIRA report'. At the bottom right of the dialog are 'Create' and 'Close' buttons. A large orange arrow points from the 'Create' button on the left dashboard to the 'Create' button in the dialog box.

STEP 3: CREATE A PAGE

1. Click the “Create” button
2. Select a space for the page
3. Select the “Blank Page”

Where should I create my page?

If you're creating a page from the navigation bar at the top of the screen (i.e. the blue Create button), make sure to select the appropriate space.

The image consists of two side-by-side screenshots of the Atlassian Confluence dashboard. Both screenshots show a similar layout with a header bar, a sidebar on the left, and a main content area on the right.

Screenshot 1 (Left): This shows the 'Create Space' option being selected. A yellow circle labeled '1' highlights the 'Create Space' button in the sidebar. A larger yellow box highlights the 'Create Space' button in the main content area. A context menu is open in the top right corner, showing options like 'Update Status...', 'Add Personal Space...', and 'Recently Viewed'. The 'Add Personal Space...' option is highlighted in blue.

Screenshot 2 (Right): This shows the 'Create' dialog box open. A yellow circle labeled '2' highlights the 'Select space' dropdown menu. A larger yellow box highlights the 'Mobile Development Team' option in the dropdown. The 'Create' dialog also contains other options like 'Blank page', 'Decision', 'File list', etc., each with a small icon and a brief description. A 'Create' button is visible in the bottom right corner of the dialog.

What is a Personal Space?

Your personal space is where to store the content you care about. It's a place to draft ideas, share your bio and contact information, and store stuff for personal projects.

Step 1: Create a Personal Space

From the user profile dropdown, select “Add personal space”.

The screenshot shows the Confluence Dashboard. At the top right, there is a user profile icon with a dropdown menu. The menu items include: Update Status..., Add Personal Space... (which is highlighted with a blue background), Recently Viewed, Profile, Tasks, Favourites, Watches, Drafts, Status updates, Network, Settings, and Log Out. An orange arrow points from the text "From the user profile dropdown, select ‘Add personal space’." to the "Add Personal Space..." option in the dropdown menu.

Confluence

Spaces People Create

Dashboard

Welcome to Confluence

Popular All Updates Favourite Spaces Network Space Categories

Spaces Pages Network

Site Spaces Create Space

- Android Revamp Project
- Demonstration Space
- Integrations Project
- Mobile Development Team
- Product Marketing Team

Android Revamp Project Home Mitch Davis Yesterday at 11:28 AM

Mitch Q4 Goals Mitch Davis Mar 22, 2015

Product Marketing Team Home Mitch Davis Yesterday at 11:29 AM

Mitch Davis's Home Mitch Davis Mar 22, 2015

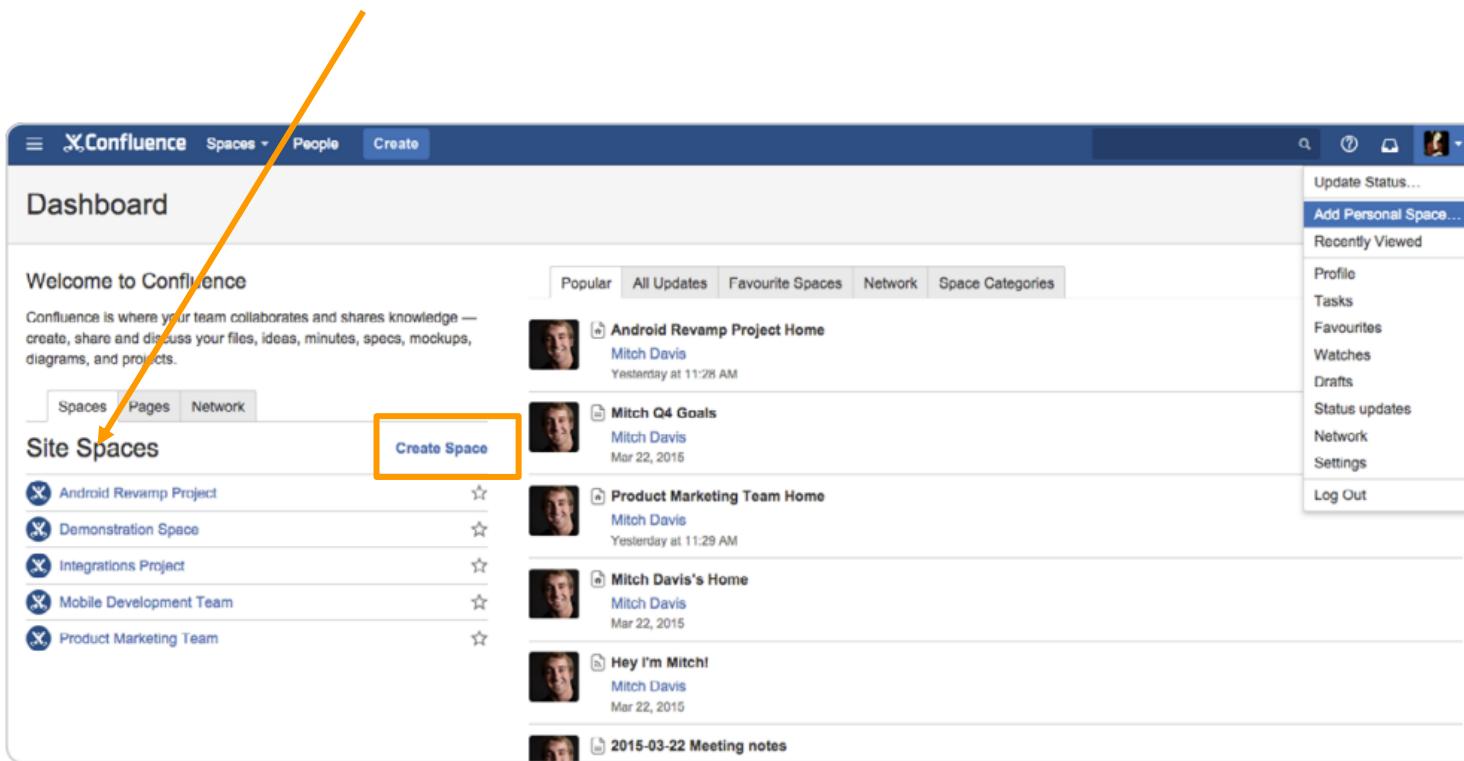
Hey I'm Mitch! Mitch Davis Mar 22, 2015

2015-03-22 Meeting notes

What lives in a Personal Space?

What lives inside a personal space? (Spaces are made up of pages.)

Select **Create Space** to create a new Space. These new Site Spaces will be stored on the left of the Dashboard.



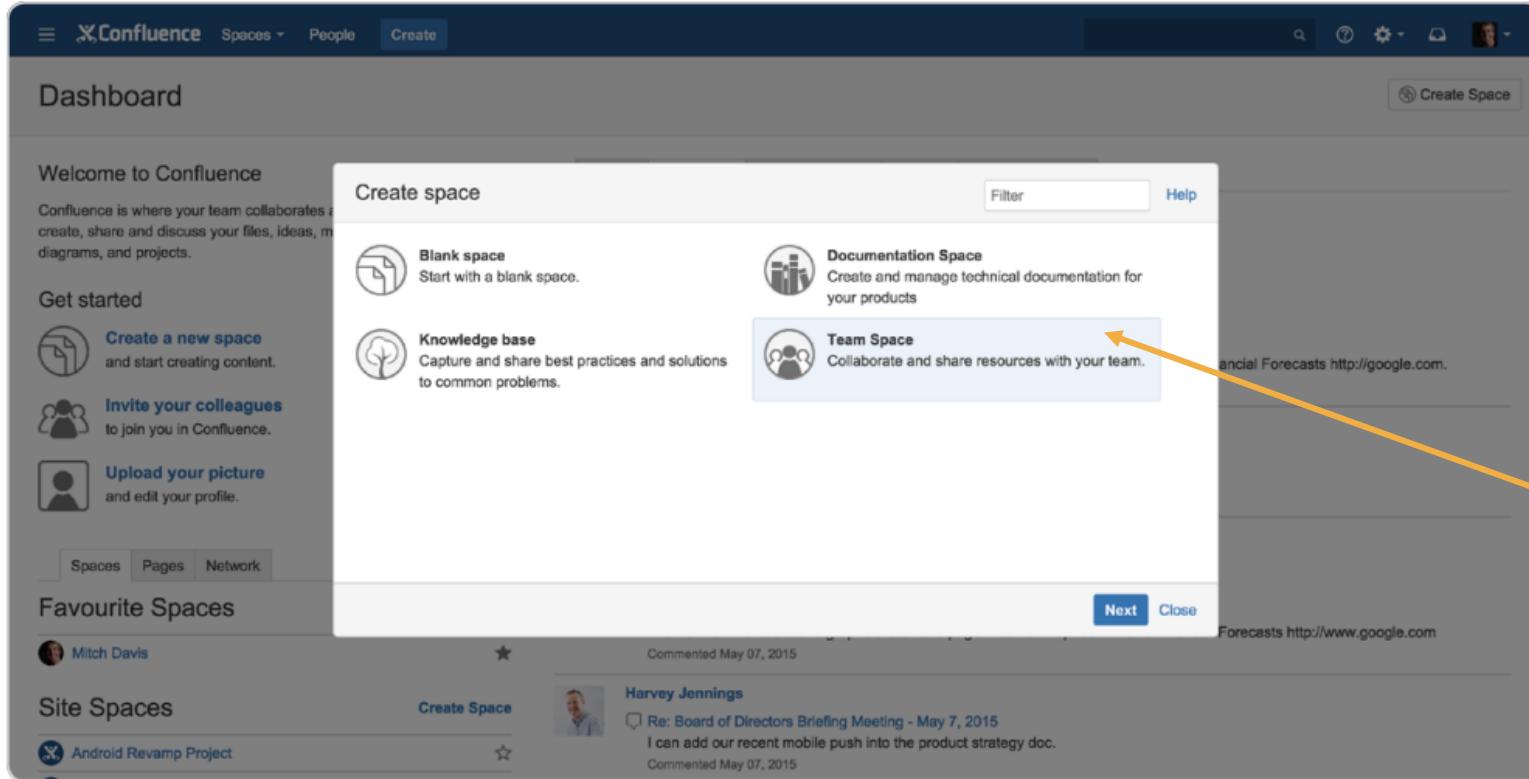
The screenshot shows the Confluence Dashboard. At the top, there's a navigation bar with 'Confluence', 'Spaces', 'People', and 'Create' buttons. Below the navigation is a 'Dashboard' section with a 'Welcome to Confluence' message. Underneath is a 'Site Spaces' section listing several spaces: 'Android Revamp Project', 'Demonstration Space', 'Integrations Project', 'Mobile Development Team', and 'Product Marketing Team'. To the right of this list is a sidebar with options like 'Update Status...', 'Add Personal Space...', 'Recently Viewed', 'Profile', 'Tasks', 'Favourites', 'Watches', 'Drafts', 'Status updates', 'Network', 'Settings', and 'Log Out'. A large orange arrow points from the bottom-left towards the 'Create Space' button in the 'Site Spaces' list, which is also highlighted with an orange box.

Example Pages:

- The homepage- This is the landing page when you create your personal space, and what others will see when they visit. Include information about yourself and what you're working on.
- Pages not ready to be viewed by others - Create drafts of project plans, or documents that you can later move to a team or project space.
- Pages for personal work - Create pages to track your personal goals, or to record notes from a meeting you attended.

What is a Team Space?

Since Confluence is ideal for teamwork, you'll want to make a space that is inviting and useful for your teammates to share.



The screenshot shows the Confluence dashboard with a 'Create space' modal open. The modal has three options: 'Blank space', 'Documentation Space', and 'Team Space'. An orange arrow points to the 'Team Space' option, which is described as 'Collaborate and share resources with your team.' Below the modal, there are sections for 'Welcome to Confluence', 'Get started', and 'Favourite Spaces'.

Example Pages:

- **Team homepage**- Use this page to show off your team, what they do, and any of their work.
- **Space Shortcuts** - Use Space Shortcuts in the sidebar to link to important pages your team needs regular access to, like your roadmap or JIRA Agile boards.
- **Pages from templates** - Confluence automatically collects the pages you create using templates in the sidebar.

Step 2: CREATE A TEAM SPACE

From the Spaces dropdown, select “Create space”> select “Team space”

Space Overview

Each space comes with an Overview that you can use to tell team members and other stakeholders all about the purpose of your space and what they will find in it.

The screenshot shows the Confluence interface for a space named 'John Doe'. The left sidebar includes links for Home, Recent, Spaces, People, Apps, More, Overview (which is selected), Blog, Space Settings, and Page Shortcuts. The main content area displays a welcome message: 'Welcome to your knowledge base space!' followed by a list of suggestions for getting started. A yellow callout box points to the pencil icon next to the first suggestion: 'Explain how this knowledge base space should be used by selecting the Edit button and customizing this Overview page'. At the bottom of the content area, there's a note: 'Remove this panel once you're ready to share your space with team members.' The footer features links for Most viewed articles and Recently updated.

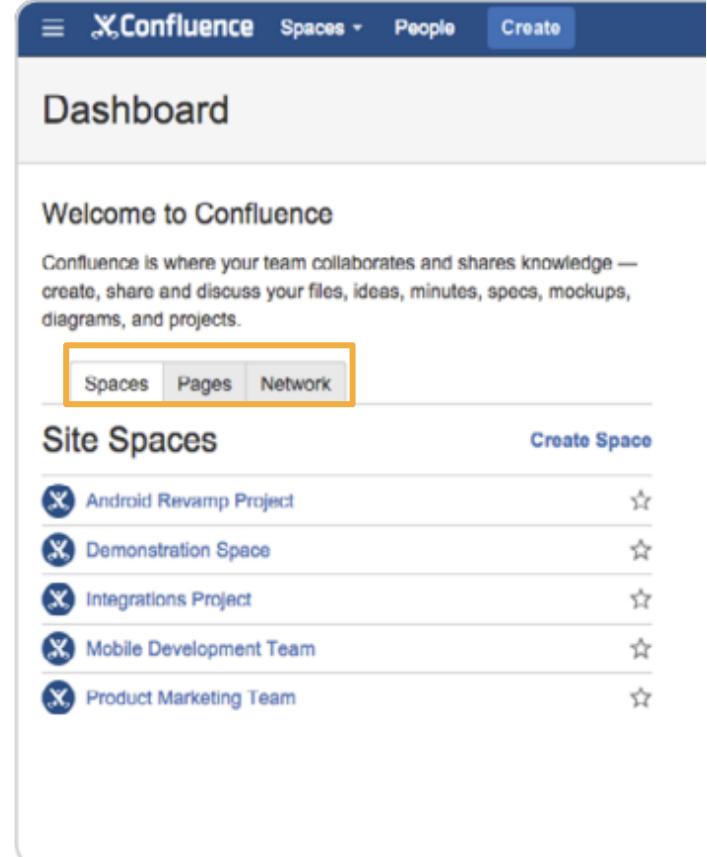
Try these tricks to make your overview pop:

- Upload a banner/logo to help people identify your space quickly
- Describe your team's mission and goals
- Add a table of contents, team calendar, roadmap, or tips.

To customize your overview, select the pencil icon and edit the overview just like you would any other page.

Structure your Information

It is important that you set up your Spaces, Pages, and Network accurately. This will allow you to keep your information structured. To do so, we need to set up the control page, permissions and integrations.



The screenshot shows the Confluence Dashboard. At the top, there is a navigation bar with icons for Home, Confluence, Spaces, People, and Create. Below the navigation bar, the title "Dashboard" is displayed. Under the title, the heading "Welcome to Confluence" is shown, followed by a brief description: "Confluence is where your team collaborates and shares knowledge — create, share and discuss your files, ideas, minutes, specs, mockups, diagrams, and projects." Below this, there is a horizontal menu bar with three items: "Spaces" (which is highlighted with a yellow box), "Pages", and "Network". Underneath the menu, the section "Site Spaces" is titled "Create Space". It lists five spaces: "Android Revamp Project", "Demonstration Space", "Integrations Project", "Mobile Development Team", and "Product Marketing Team", each represented by a small icon and a star rating.

Space	Rating
Android Revamp Project	☆
Demonstration Space	☆
Integrations Project	☆
Mobile Development Team	☆
Product Marketing Team	☆

Control Page History

You can view the Control Page History by selecting the three dots, and page history in the dropdown.

The screenshot shows the Confluence interface for a page titled "How-to article". A context menu is open from the three-dot icon in the top right. An orange arrow points to the "Page history" option in the bottom-most section of the menu. The "Page versions" section is highlighted with an orange border. It displays one version: "CURRENT (v. 1)" created "About 2 hours ago" by "BK". Below it are "Compare selected versions" and "Return to Page Information".

John Doe

Home Recent Spaces People Apps More

Search

John Doe

How-to article

Created by BONNIE KUROWSKI About 2 hours ago • 1 min read

Instructions

1.
2.
3.

Highlight important information in a panel like this one. To change the color or style, select one of the options in the menu.

Related articles

Be the first to add a reaction

Copy
Move
Export
Convert to blog
Archive
Delete
Presenter mode

Page versions

Select	Version	Published	Changed By	Status	Comment	Actions
<input type="checkbox"/>	CURRENT (v. 1)	About 2 hours ago	BK			

Compare selected versions

Return to Page Information

Page history

Attachments 0

Resolved comments 0

Advanced details >

Slack Notifications

Permissions

Content's accessibility is an important part of determining Permissions.

- Permissions allow you to control who can view and edit the content you're working on.
- There are always documents you don't want everyone to see or edit.
- Keep pages private by adding and updating permissions, and restrict access to yourself, your team, or your company.

Note: If you've created a space for your team, you are the administrator of that page. Make sure that everyone on the team has the proper permissions to view, edit, and add content in your space.



Pages inherit the permissions of the Space they are in.

Space administrators have the power to control what content is accessible in that Space.

A screenshot of a software interface, likely a content management system. The top navigation bar includes Home, Recent, and Space. The left sidebar lists Promotions, SECURITY, Users, Groups, and Security Configuration. Two items, Global Permissions and Space Permissions, are highlighted with orange boxes. The main content area is partially visible.

Looking at Permissions

Permissions are really important in Confluence. They allow you to control who has access to what. You can give everyone in the company, or on the Confluence site, the ability to view and add content to the space **but not delete**.

The screenshot shows the 'Space Tools' page in Confluence, specifically the 'Permissions' tab. The left sidebar lists various space tools like Pages, Blog, and Meeting notes. A yellow box labeled '1' highlights the 'Space tools' dropdown. An orange arrow points from this dropdown to a yellow box labeled '2' around the 'Permissions' tab in the top navigation bar. Another orange arrow points from the 'Edit Permissions' button in the 'Groups' section to a yellow box labeled '3'.

Space Tools

Overview Permissions Content Tools Look and Feel Integrations

Groups

These are the permissions currently assigned to groups for this space.

	All	Pages	Blog	Comments	Attachments	Restrictions	Mail	Space
confluence-users	<input checked="" type="checkbox"/>							

Individual Users

These are the permissions currently assigned to individual users for this space.

	All	Pages	Blog	Comments	Attachments	Restrictions	Mail	Space
Alana Grant (agrant)	<input checked="" type="checkbox"/>							
Cassie Owens (cowens)	<input checked="" type="checkbox"/>							
Harvey Jennings (harvey)	<input checked="" type="checkbox"/>							

STEP 1: LOOK AT YOUR SPACE PERMISSIONS

"Space Tools" > "Permissions"

Permissions by Group or Individual

You can add users by group work teams or add individual users. Both will show up on your page.

Individual Users											
	All	Pages		Blog		Comments		Attachments		Restrictions	
	View	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete
Alana Grant (agrant)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cassie Owens (cowens)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Harvey Jennings (harvey)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Kevin Campbell (kcampbell)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mitch Davis (tcaldwell)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Edit Permissions



Groups											
	All	Pages		Blog		Comments		Attachments		Restrictions	
	View	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete
confluence-users	✓	✓	✗	✓	✗	✓	✗	✓	✗	✗	✗

Edit Permissions



Space Permissions

You can adjust your permissions to narrow down each space permission.

Space permissions allow you to see:

- Who can see the content in a space
- Who can comment on that content
- Who can create, edit, or upload content

The screenshot shows the Confluence sidebar on the left and the 'Space settings' page on the right. A large orange arrow points from the 'Space permissions' link in the sidebar to the 'Space permissions' tab in the main content area. Another orange arrow points from the 'Space settings' label on the sidebar to the 'Space settings' label on the page. The 'Space permissions' tab is highlighted with a blue border. The main content area displays the 'Manage space' section and the 'Groups' section, which includes a table for granting permissions to a group named 'confluence-admins-'.

	All	Pages	Blog	Comments
View	✓	✓	✓	✓
Delete Own	[?]	✗	✓	✓
Add	✓	✓	✓	✓
Archive	✓	✗	✓	✓
Delete	✓	✓	✓	✓
Add	✓	✓	✓	✓
Delete	✓	✓	✓	✓
confluence-admins-	✓	✗	✓	✓

To get to space permissions:

1. Go to the space.
2. Select Space settings in the Confluence sidebar.
3. Select the Permissions tab in space settings.

**The Permissions tab will only appear if you're a space admin in that space*

Integrations

You can use the integrations tab to access Application links, RSS Feeds and Slack Notifications.

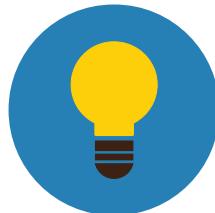
Access Integrations:

1. Click settings wheel
2. Select Integrations on left menu

The screenshot shows the 'Space settings' page in Confluence. On the left, there's a sidebar with user information (John Doe) and navigation links: Overview, Blog, Space Settings (selected), Manage space, Space permissions, Manage pages, Look and feel, and Integrations (highlighted with an orange box). The main content area has a search bar and two sections: 'Manage space' and 'Space permissions'. Below these is a large 'Integrations' section with a puzzle piece icon, containing links to Application Links, RSS feeds, and Slack Notifications. A yellow arrow points from the 'Integrations' link in the main content back to the 'Integrations' link in the sidebar.

Structure your information

Now that you can set up pages and permissions, you are ready to structure your information.



Make your space easy to navigate so team members and other stakeholders can find the content they're looking for quickly.

To use the page tree to your advantage, create a page for each task or project your team is involved with and nest related child pages underneath it.

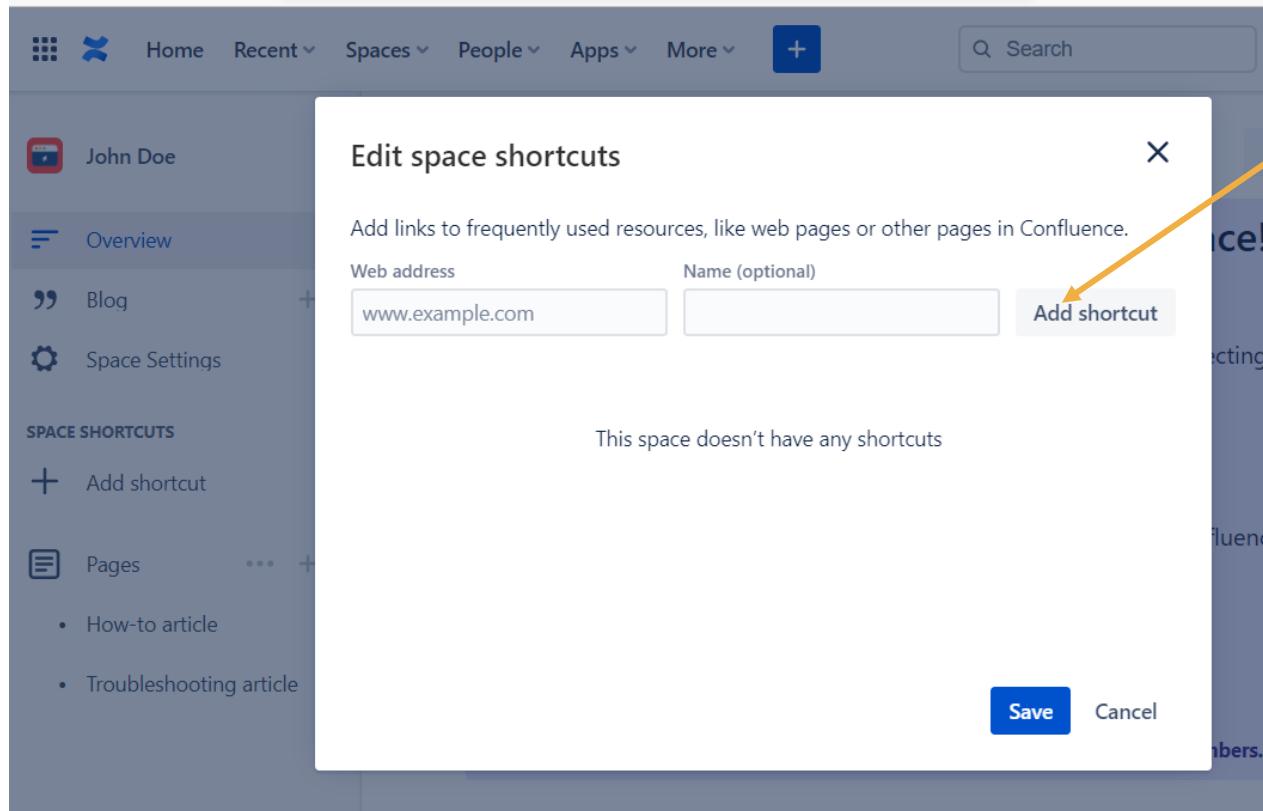
Use parent pages to group similar content

You can nest pages underneath other pages, creating a hierarchy of content in each space.

This hierarchy is reflected in the page tree, which appears in the space sidebar to the left of the active page.

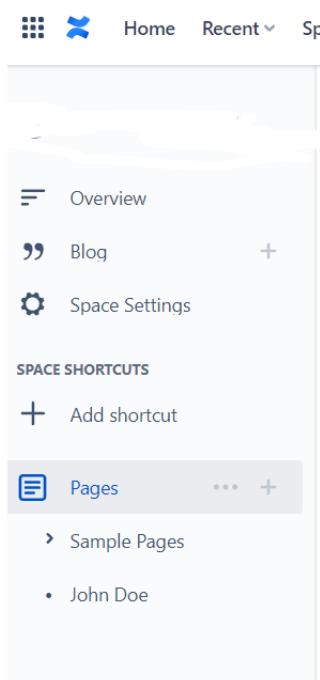
Create Shortcuts for Important Pages

You can create unique space shortcuts. These are links that are pinned to the space sidebar, above the page tree, for every space in your site. Use these to highlight important content so it's easy to find.



STEP 2: CREATE A SPACE SHORTCUT

To create your first space shortcut, navigate to your space and select + Add shortcut in the sidebar.



Label Pages and Attachments

Labels make it easier to identify related pages and attachments, so team members and stakeholders can find what they're looking for.



John Doe



Created by BONNIE KUROWSKI
21 minutes ago • 1 min read

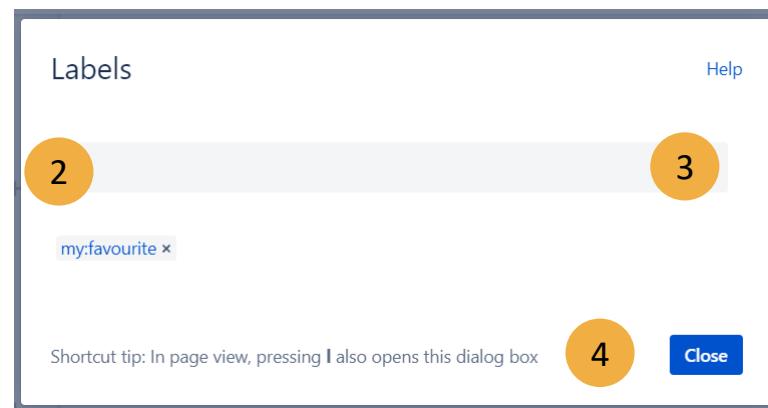
Table of Contents:

Be the first to add a reaction

1
No labels

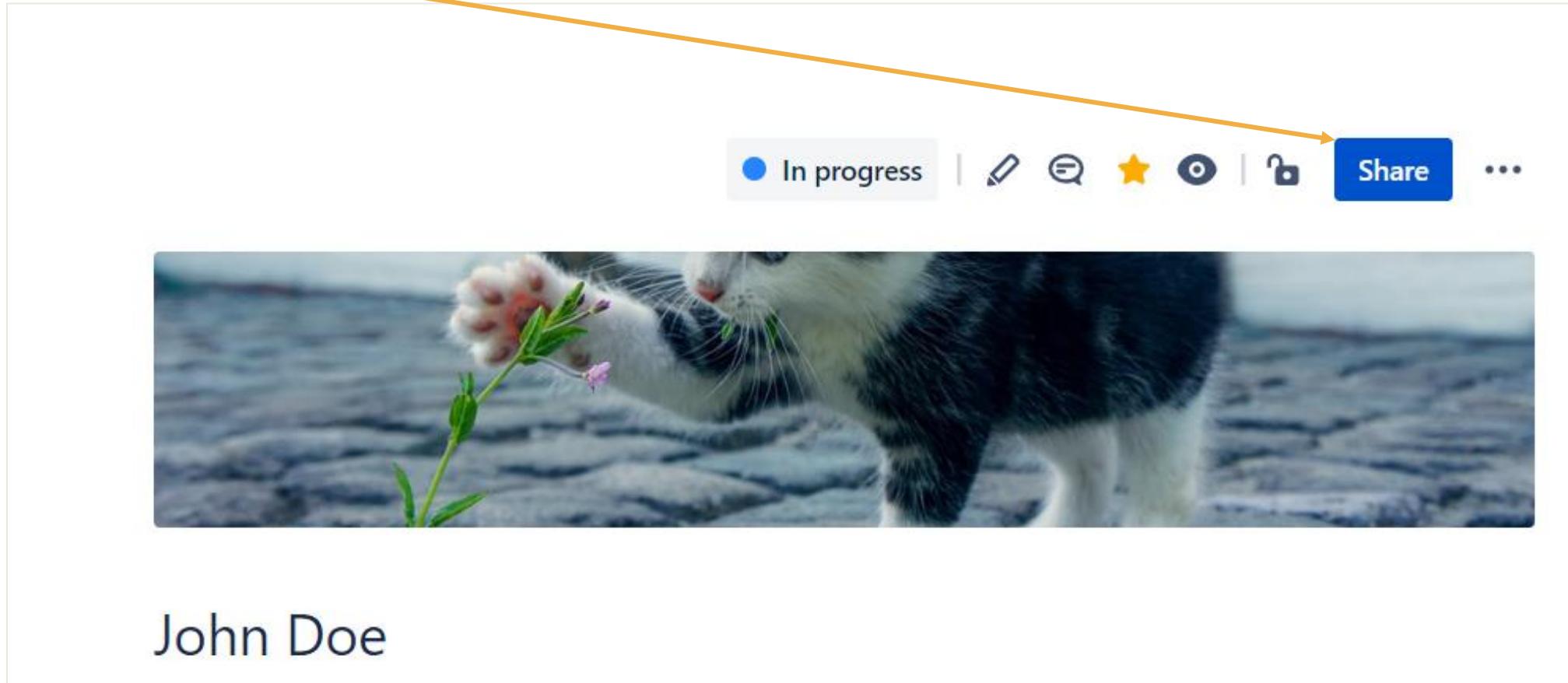
STEP 3: LABEL

1. Select the label icon () in the bottom right.
2. Enter the name of the label you'd like to apply.
3. Select Add to apply the label.
4. Select Close to exit the dialog.



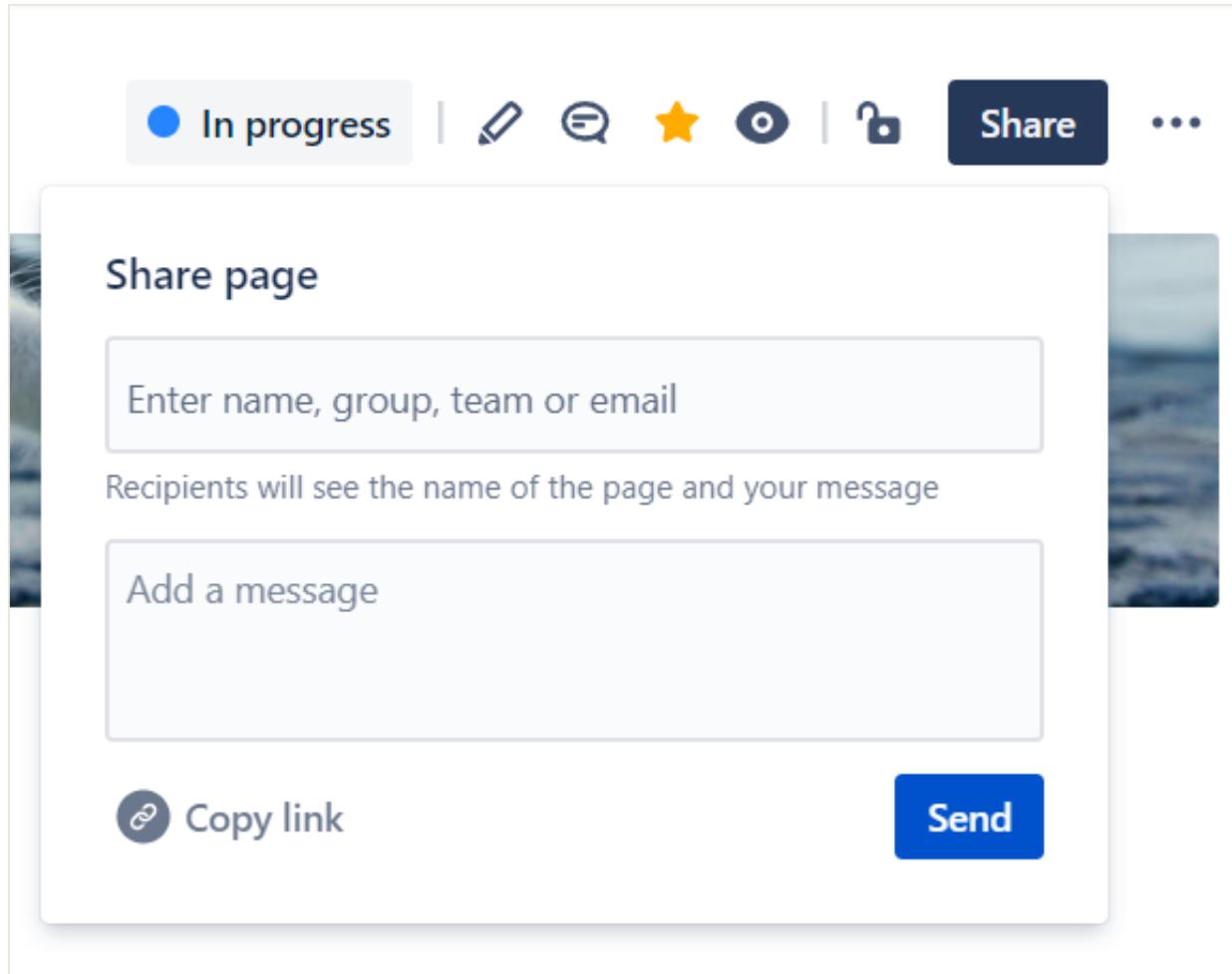
Invite Team Members

Now that you have your pages set up, you can invite team members! Click the **Share** button.



Invite Team Members

Now that you have your pages set up, you can invite team members!



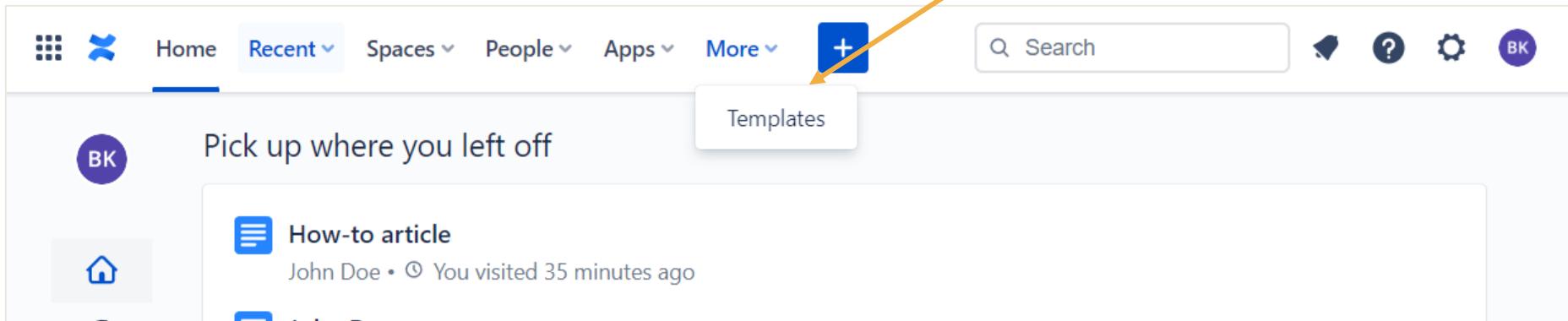
Enter the email address of each team member you'd like to invite. You can invite up to 10 email addresses at a time.

Click Send.

Accessing Templates

You can optimize creation with predefined and custom templates. Let's take a look at how to locate and use both predefined and custom.

To access templates and create your own, select the More drop down arrow and select Templates.



Predefined Templates

At the top of the page you will find categories of predefined templates to choose from. You can select a category to narrow down the templates.

The screenshot shows the 'Templates' page in Atlassian Confluence. At the top, there is a navigation bar with icons for Home, Recent, Spaces, People, Apps, More, and a plus sign for creating new content. Below the navigation bar, the page title is 'Templates' next to a user profile icon for 'BONNIE KUROWSKI'. There is a dropdown arrow icon to the right of the title. Below the title, there is a search bar with a magnifying glass icon and the text 'All 118'. To the right of the search bar are several category filters: 'Business strategy 23', 'Design 12', 'Docs & Reports 20', 'Human resources 13', 'Marketing & Sales 18', 'Personal 9', 'Productivity 23', 'Product management 16', 'Project planning 31', 'Software development / IT 19', 'Startup 39', and 'Teamwork 39'. On the far right, there is a 'Recommended' dropdown menu with a downward arrow icon. At the bottom of the page, there is a small upward arrow icon.

Types of Templates

There are many types of templates available. You can start off selecting one and changing it to fit your needs, or you can build your own. If you select a template type, you will see information about that template on the right of your screen.

The screenshot shows a user interface for selecting a template. At the top left is a purple icon representing a group of people. Below it, the text "All hands meeting" is displayed. To the right, there are two main sections. The first section contains a card for a "Startup" template titled "Business status update" by Steven Bao, Atlassian. This card includes a small star icon. The second section contains a card for another "Startup" template titled "End of week status report". Both cards have a blue document icon and the word "Startup" below their titles.

This screenshot shows a detailed view of a template on the right side of the screen. At the top, there is a blue icon representing a video call, followed by the title "1-on-1 Meeting" and a star icon. Below the title, a description reads: "Run 1-on-1 meetings and maintain productive working relationships." A prominent blue button labeled "Use template" is centered. In the bottom right corner of the main content area, there is a light purple box containing the text: "This template is brought to you by Meetical, an online meeting management tool." To the right of this main content area is a table with six rows, each defining a field for the template. The fields are: Date, Time, Participants, Location, Meeting type, and Materials. Each row includes a brief description of what can be typed or linked.

Date	Type // to add a date
Time	e.g., 10:00-10:30am PST
Participants	@ mention participants
Location	Type /link to add a video conferencing link
Meeting type	e.g., Weekly check-in meeting
Materials	Type /link to add previous meeting notes or other materials

Category

Once you select a category for the template, it will populate templates that fit into that category. You can choose which template by clicking on the template box.

The screenshot shows a 'Templates' interface with a search bar and user profile 'BONNIE KUROWSKI'. Below the search bar are category filters: All (118), Business strategy (23), Design (12), Docs & Reports (20), Human resources (13), Marketing & Sales (18), Personal (9), Productivity (23), Product management (16), Project planning (31) [highlighted with a yellow box], Software development / IT (19), Startup (39), and Teamwork (39). A 'Recommended' dropdown is also present. The main area displays a grid of templates:

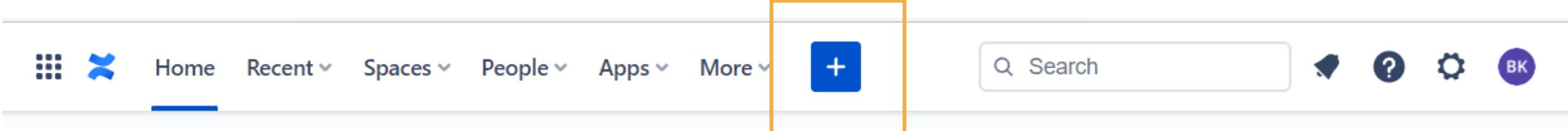
Icon	Name	Author	Type
M	Brainstorming	by Mural	Teamwork
FE	Business status update	by Steven Bao, Atlassian	Startup
FLask	Capacity planning		Teamwork
Y	DACI: Decision documentation		Teamwork
Person	Daily stand up template		Startup
Document	End of week status report		Startup
Graph	Goals, signals, measures		
IT	IT project master		
M	Master project	by Mural	

Note:

If you do not wish to use a predefined template, you can make your own.

Build your Own Page

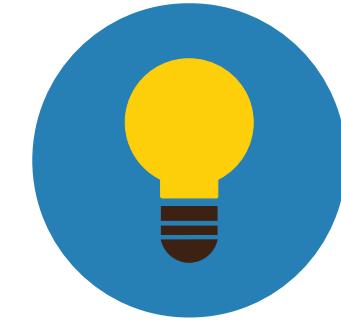
To build your own page, click on the Blue Plus Sign.



Starting a New Page

The empty page will populate with the ability to still add a predefined template, and a “Learn the Basics” section.

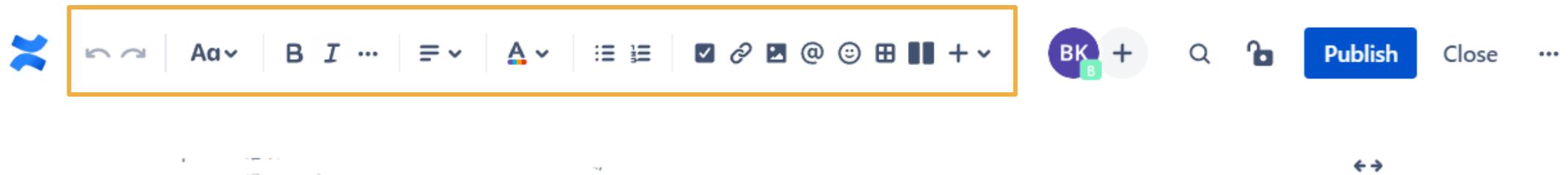
The screenshot shows a digital workspace interface with a toolbar at the top. Below the toolbar, the user is in the 'Pages' section under 'Overview'. A purple 'Learn the basics' panel is open on the left, containing sections for 'Templates', 'Slash commands', 'Table manipulation', 'Image display', and 'Columns'. A 'Templates' sidebar is also open, showing a search bar and a list of categories: 'All 119 Business strategy 23', 'Design 12 Docs & Reports 20', and 'Human resources 13'. The 'Sort by Recommended' dropdown is selected. Below the categories, there are five card-like items: 'Using the editor TUTORIAL' (Master the basics and create superb pages with confidence.), '1-on-1 Meeting' (Run 1-on-1 meetings and maintain productive working relationships.), '4 Ls Retrospective' (Use this framework to reflect back on your team's work and use what you've learned to improve.), and '5 Whys Analysis' (Build team trust by identifying problems and proposing solutions as a group).



This allows you to learn how to build the page or change it to a predefined template.

Working in a New Page

At the top of the page you will notice the toolbar of text icons. This will help you when adding content to make your content more exciting.



Give this page a title

Type / for a list of useful elements you can add to the page, like a table of contents or roadmap.

Or if your mind's gone as blank as this page, start with one of the templates on the right →

Adding Content

To work in the new page, you will want to give it a title. In this example, I will use John Doe. You can see there are three other options, adding emoji's, header images, and status. To add a header image, select the button.

Smiley face icon Add emoji

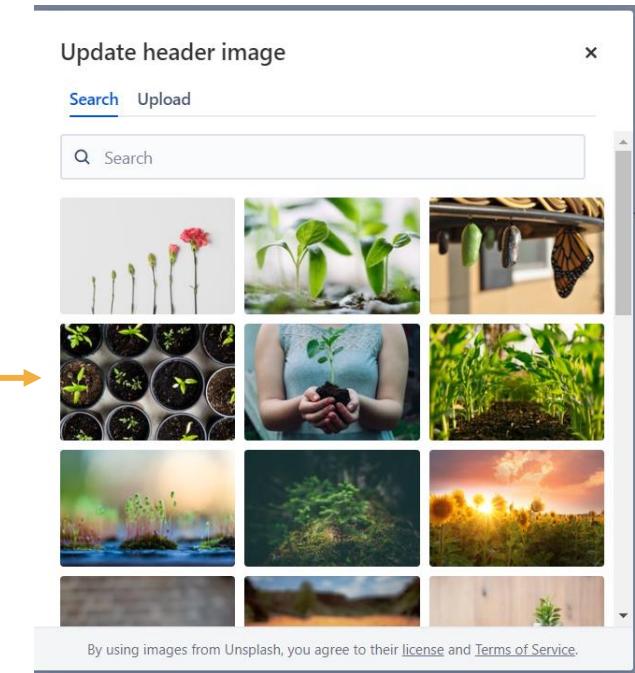
Image icon Add header image

Clock icon Add status

John Doe

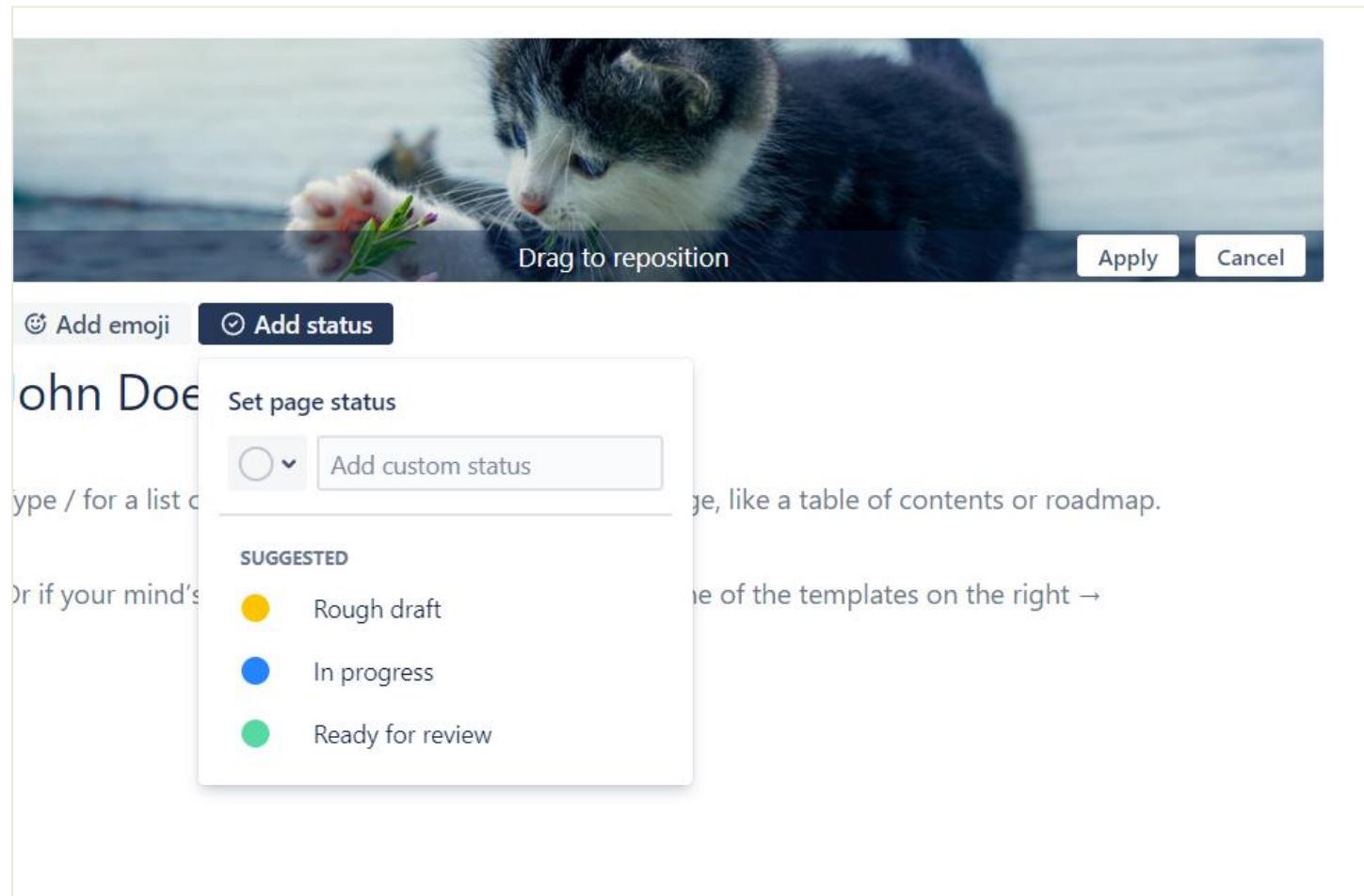
Type / for a list of useful elements you can add to the page, like a table of contents or roadmap.

Or if your mind's gone as blank as this page, start with one of the templates on the right →



Adding Status

You can also set a status to the page by selecting the Add Status button.



Publish Self-Created Template

After you add your page details, select the **Publish** button.

Now you have created a page!

The image shows a screenshot of a page editor interface. On the left, there's a toolbar with various icons like back, forward, search, and a publish button. Below the toolbar is a breadcrumb navigation bar showing '/ Pages / Overview'. A main content area displays a black and white kitten with a small sprig of flowers, with a 'Drag to reposition' handle at the bottom. At the bottom of this area are 'Apply' and 'Cancel' buttons. To the right of the content area is a sidebar titled 'Pages'. It lists 'Overview', 'Blog', 'Space Settings', and a 'SPACE SHORTCUTS' section with an 'Add shortcut' button. Under 'Pages', there's a 'Pages' section with a 'Sample Pages' item and a 'John Doe' item. The 'John Doe' item has a 'Created' status and a 'Table of Contents' link. At the bottom of the sidebar, it says 'Updated 15 minutes ago'. A yellow box highlights the 'Publish' button in the top right corner of the main editor area.

Questions?



Take a 10-minute break!

In this section you will learn how to work with spaces by:

Identifying and working with the Confluence editor interface
Typical text editing and formatting tools (alignment, color, paragraph indentation and styles, and text effects).
Using table creation possibilities, code snippets and mentions,
Page templates for meeting notes, task reports, and troubleshooting articles.
Creating pages outside of Confluence, in Microsoft Word, and import them directly into your space.

Confluence Page Editor “/”



Did you ever want to design a beautiful page on Confluence?

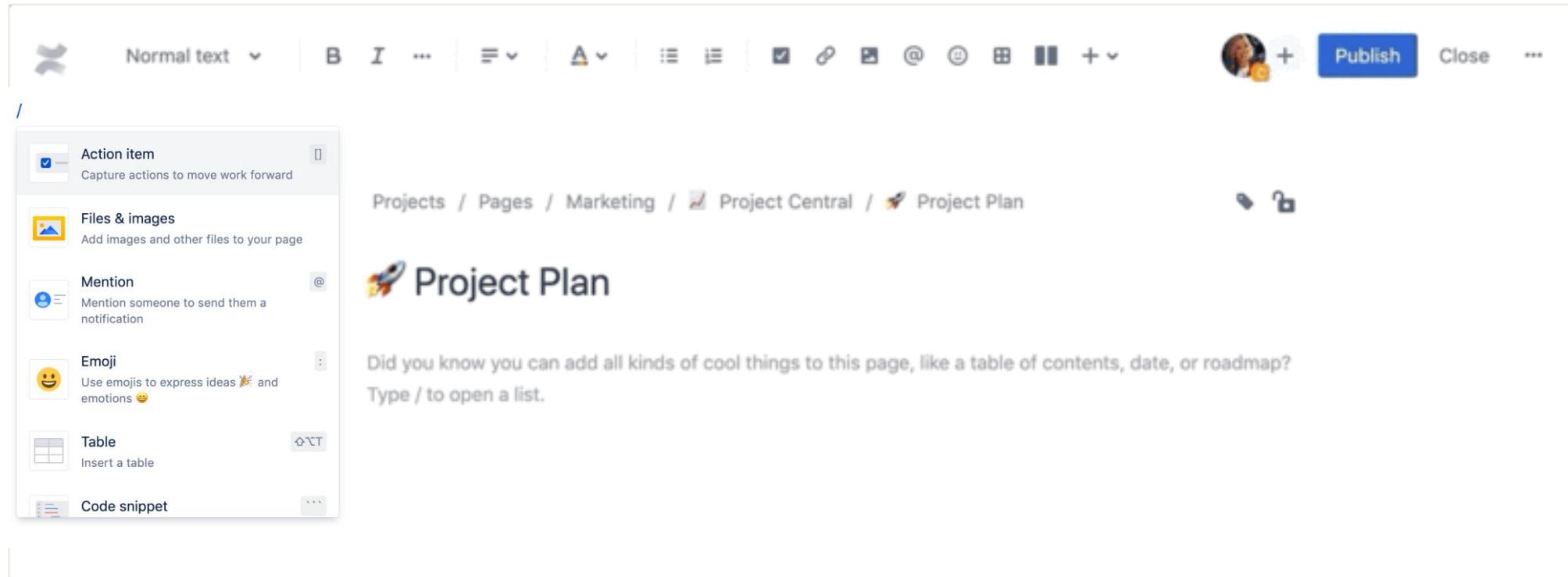
Confluence offers end-users to create compelling content, and offers an editor that lets anyone master the art of engaging content using an intuitive interface.



Simply type / into a page to get a complete list of elements you can add to the pages!

Editor Interface

The editor interface is simple to use. Open any page and add a “/” and command to add the components. Let's take a look at some common components.



/ Layouts

Do you ever want content on your Confluence page to appear side by side? Or in three columns? Layouts are easy to apply and even easier to change.

Type

The diagram illustrates the creation of a 'How-to article' page in Confluence. It starts with a 'How-to article' page template:

John Doe / Pages / John Doe / How-to article

How-to article

Explain what this how-to article is for. For example, you might write an article to teach people at your company how to set up a corporate email account or file an expense report.

A 'Layouts' macro is inserted into the page content area. The macro interface shows the following structure:

- /layouts** (highlighted with an orange border)
- Layouts** (button)
- Structure your page using sections

An orange arrow points from the 'Layouts' button in the macro interface to the 'Layouts' section in the page content area, indicating the relationship between the macro and the resulting layout structure.

The resulting page structure is shown below:

How-to article

Explain what this how-to article is for. For example, you might write an article to teach people at your company how to set up a corporate email account or file an expense report.

The page content area now includes a layout structure with two columns and a bottom section, as indicated by the orange border around the bottom right corner of the content area.

/ Files

Type /files, hit enter, and you'll have access to all of your media. Add files you recently uploaded. Select files from Google or Dropbox, and even search for the perfect Gif from GIPHY.

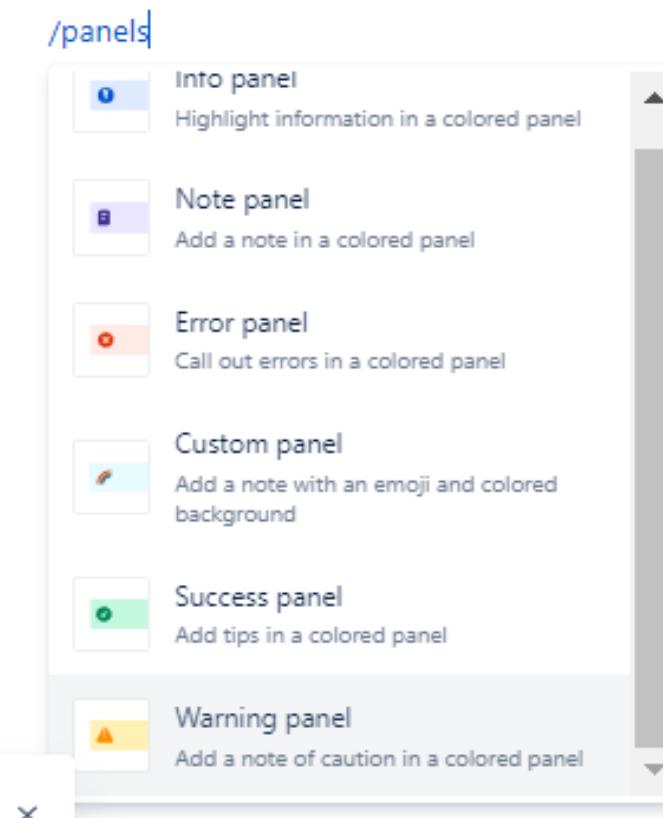
/files

-  **Files & images**
Add images and other files to your page
-  **Profile Picture**
Displays a user's profile picture.
-  **User Profile**
Displays a user's profile details.



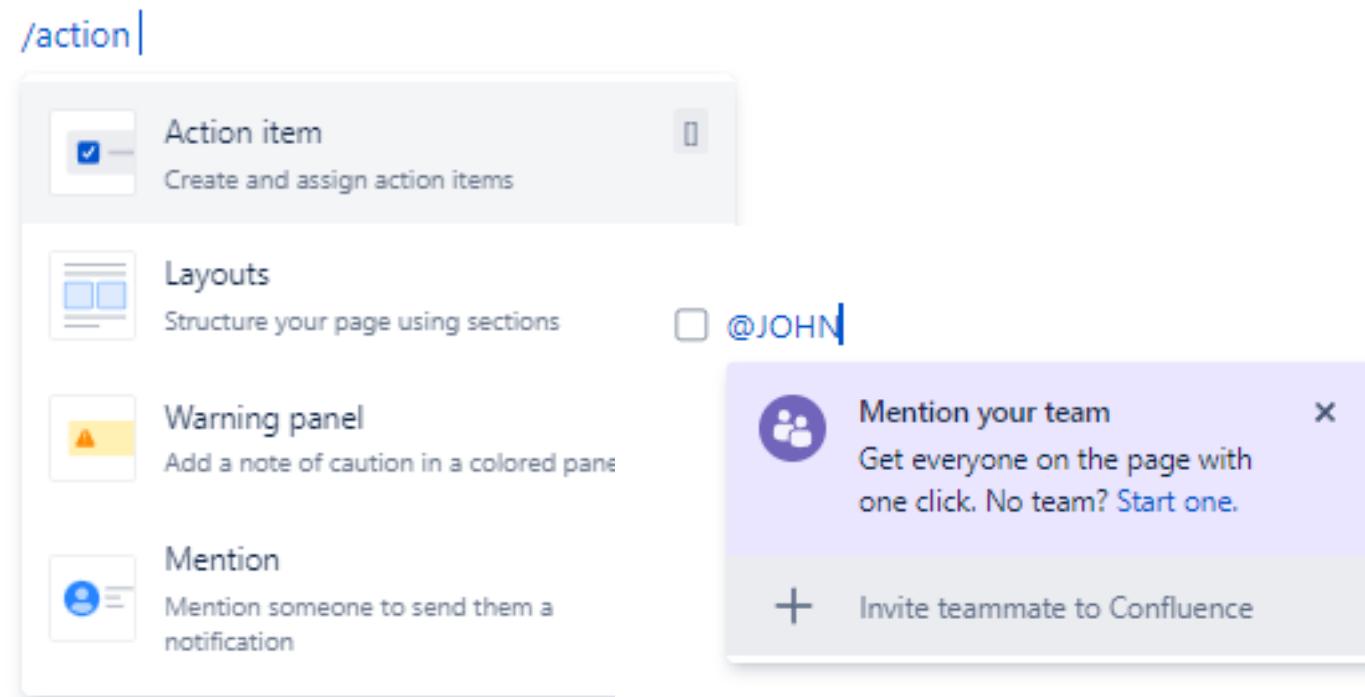
/ Panels

Panels are a great way to call out important information in your document. Highlight sections of a page with different out-of-the-box color panels for different needs.



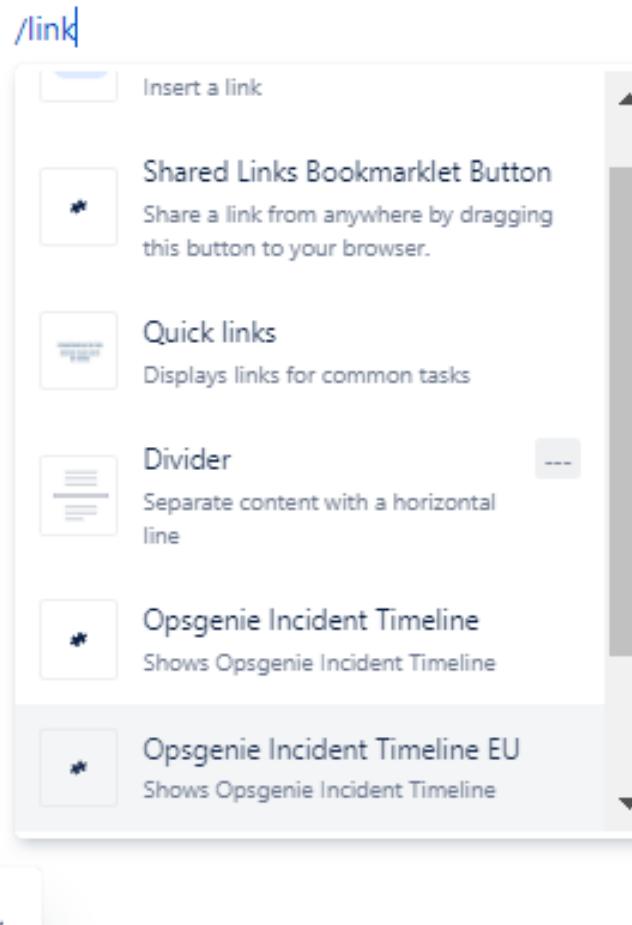
/ Action Items

Got a to-do list for yourself or your team? Assign an action item (or two!) for your team members. Even set due dates by adding a double slash command (//) to pull up the calendar menu.



/ Link

Type `/link` and hit enter to see a list of recent pages you've worked on in Confluence.



/Trello Boards or Cards

After you've created a project plan in Confluence, you can help stakeholders track the work with an embedded Trello board. Once you hit publish, anyone can view the board or move cards in Confluence.

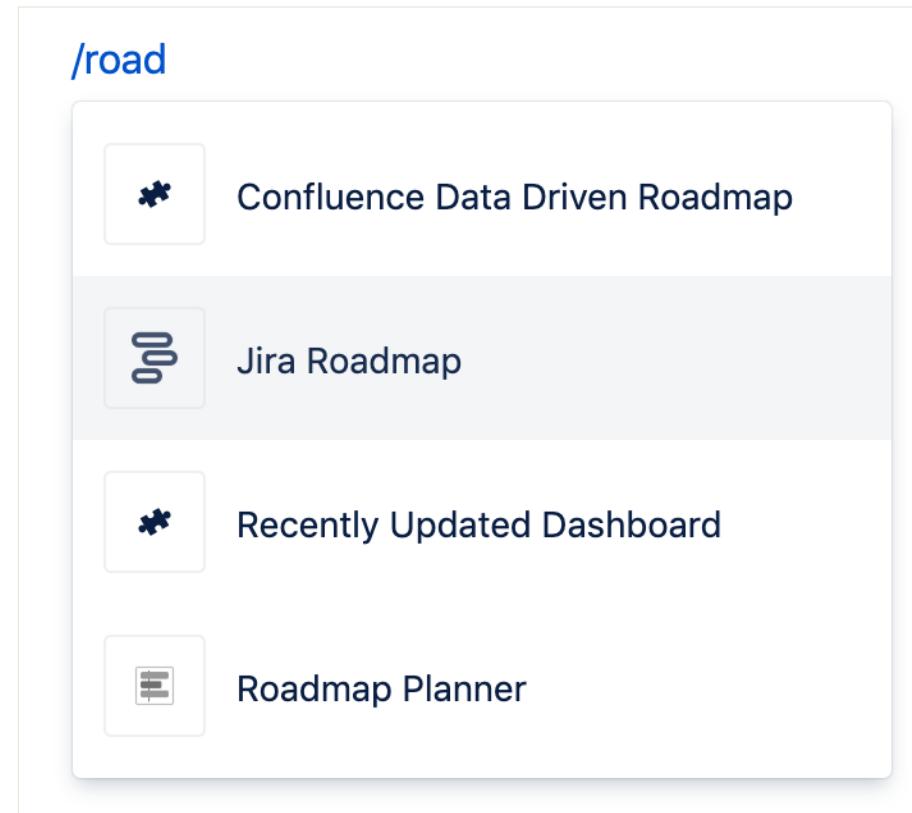
The screenshot shows the Confluence sidebar with the URL `/trello` at the top. Below it, there are two main options:

- Trello Board**: A button with a blue icon containing two white vertical bars. The text below says "Embed a fully interactive Trello board into your page."
- Trello Card**: A button with a blue icon containing two white vertical bars. The text below says "Add a beautiful preview of Trello boards and cards."

To the right, a preview window is open, showing a sample Trello board with a single card and the text "Edit to setup".

/ Jira

Keep everyone in the loop on the status of a project without navigating away from the page. Add a Jira roadmap, a Jira issue, or an entire list of Jira issues from a project to a Confluence page and get automatic updates.



/ Table of Contents

Give your team a quick way to jump through content with a table of contents, which automatically generates a list of links to all the headings and sub-headings on your page.

/tableofcontent

Table of Content Zone

Creates a Table of Contents for headings within the body of the macro.

Table of Contents

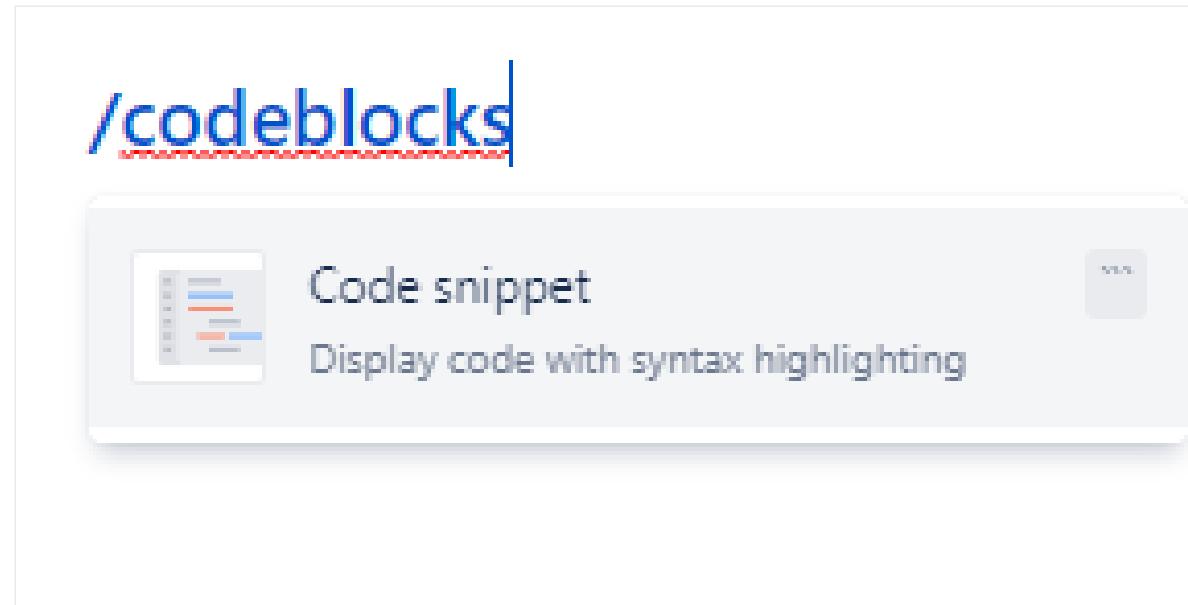
Creates a Table of Contents for the current page based on headings in the page.

On this page

- [Problem Statement](#)
- [Milestones](#)
- [Timeline](#)
- [Tracking](#)

/ Code Blocks

Code blocks are for demonstrating programming concepts or managing a library of code snippets for your team. You can create a block to display code so that it's broken out from the rest of your content and formatted by language.



/Page Properties & /Page Property Report

Page properties and Page properties report work together to show summary information from one page on another page. To use this, add the page property box on all the sub-pages you'd like to summarize.

/pageproperty

Page Properties
Enter a table of summary information in this macro and display it on another page using a Page Properties Report macro. You will need to add a label to this page and specify it in the report macro.

Page Properties Report
Display a table of pages that contain the Page Properties macro and a specific label. The table includes a link to each page and the summary information contained in the Page Properties macro(s) on that page.

What do we need to decide?

Details | id = Decisions

Status	IN PROGRESS
Stakeholders	@Mia @Jose
Outcome	What did you decide?
Due date	21 Nov 2019
Owner	@ClaireMaynie

/ Decision

Label each page with a unique label, such as “decisions.”

Then, on the page where you’d like to display the summary, type /page properties report and embed the report. Every page you’ve labeled and added the page properties macro to, will display in a summary with the fields you’ve defined.

The screenshot shows a page with the URL '/decision'. It contains two cards:

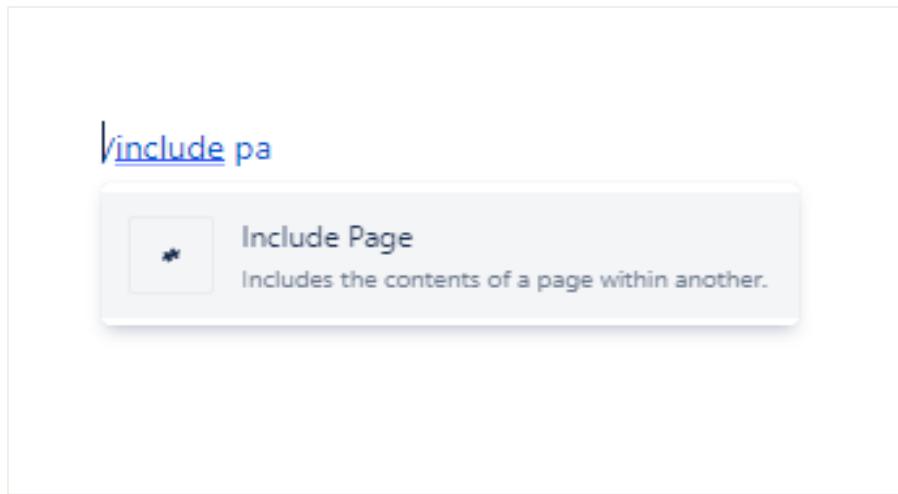
- Decision**: Capture decisions so they're easy to track. This card has a green checkmark icon and a 'Create' button.
- Decision report**: Create a report of pages and the decisions they contain. This card has a bar chart icon and a 'Create' button.

The screenshot shows a page titled 'Decision log'. At the top, it says 'Created by Claire Maynard Just a moment ago • Analytics'. Below is a table with the following data:

Title	Due date	Outcome	Owner	Stakeholders	Status
What do we need to decide?	21 Nov 2019	What did you decide?	Claire Maynard	Mia Jose	IN PROGRESS

/Include Page

If you want to create a page that displays multiple pages of content that already exist on your site, use /Include Page. This can be handy for pages that need to refer to other information. Instead of having to keep multiple pages up to date, keep one page up to date and refer to that master page from other pages.



Edit 'Include Page' Macro

Includes the contents of a page within another. [Documentation](#)

Page to Include *

Project Plan

To specify a page in a different space, use SPACEKEY:Page Title.

Status	PLANNING
Launch date	30 Aug 2019
Project tracking	https://mycloudconfluence.com/1
Team	@Alana Grant - Produ @Max Taylor - Design @Jennifer Evans - En @Mitch Davis - Marke
Relevant pages	Web Content

Goals

Increase customer conversion rate on the website by 15%.

Background

Our new "view art in your room" feature will allow buyers to virtually place artwork on a wall of their choosing so they can preview artwork before they purchase.

- Problem Statement
- Milestones
- Project Tracking

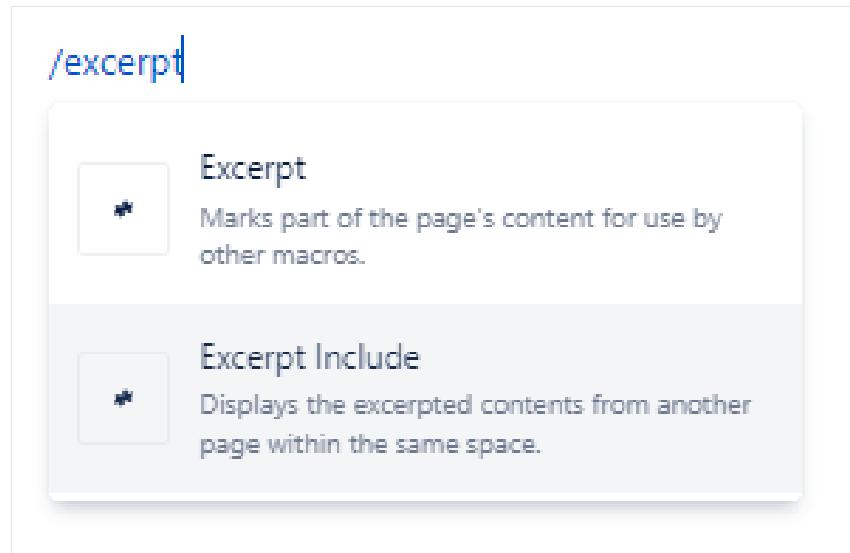
Select macro

Save Cancel

/ Excerpt and / Excerpt Include

If you want to display part of a page only, /excerpt and /excerpt include work together to display “excerpted” (that is, a segment of) content from one page to another page.

If you want to share goals across different teams who are working across different pages , you can go to those pages and add an excerpt around the part of the page you'd like to display.



Excerpt	
Marketing goals	
Traffic	Increase website traffic by 15%
Social	Gain more social media followers
Email	Grow an email list by 20%

Goals

On your master page, use / excerpt include and add each page's excerpt by identifying the name of the page it's on. This can display actions like one's below, which display the goals from the Marketing Team page and the Product Team page onto one master goal page.

The screenshot shows a 'Goals' page with a light gray header bar. On the left is a small profile picture of a woman, followed by the text 'Created by Claire Maynard' and 'Last updated 3 minutes ago • Analytics'. Below the header, there are two main sections: 'Marketing Goals' and 'Product goals', each containing a table of goals.

Marketing Goals

Marketing goals	
Traffic	Increase website traffic by 15%
Social	Gain more social media followers
Email	Grow an email list by 20%

Product goals

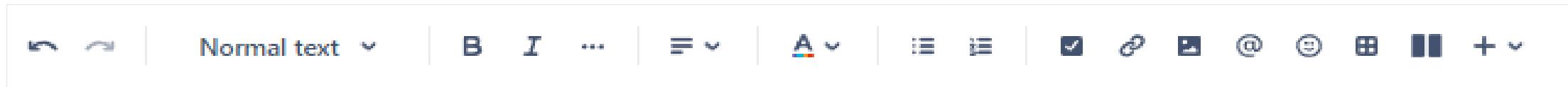
Customer happiness	Increase CSAT
MAU	Increase MAU by 10%
Integrations	Launch 4 integration partners

Toolbar

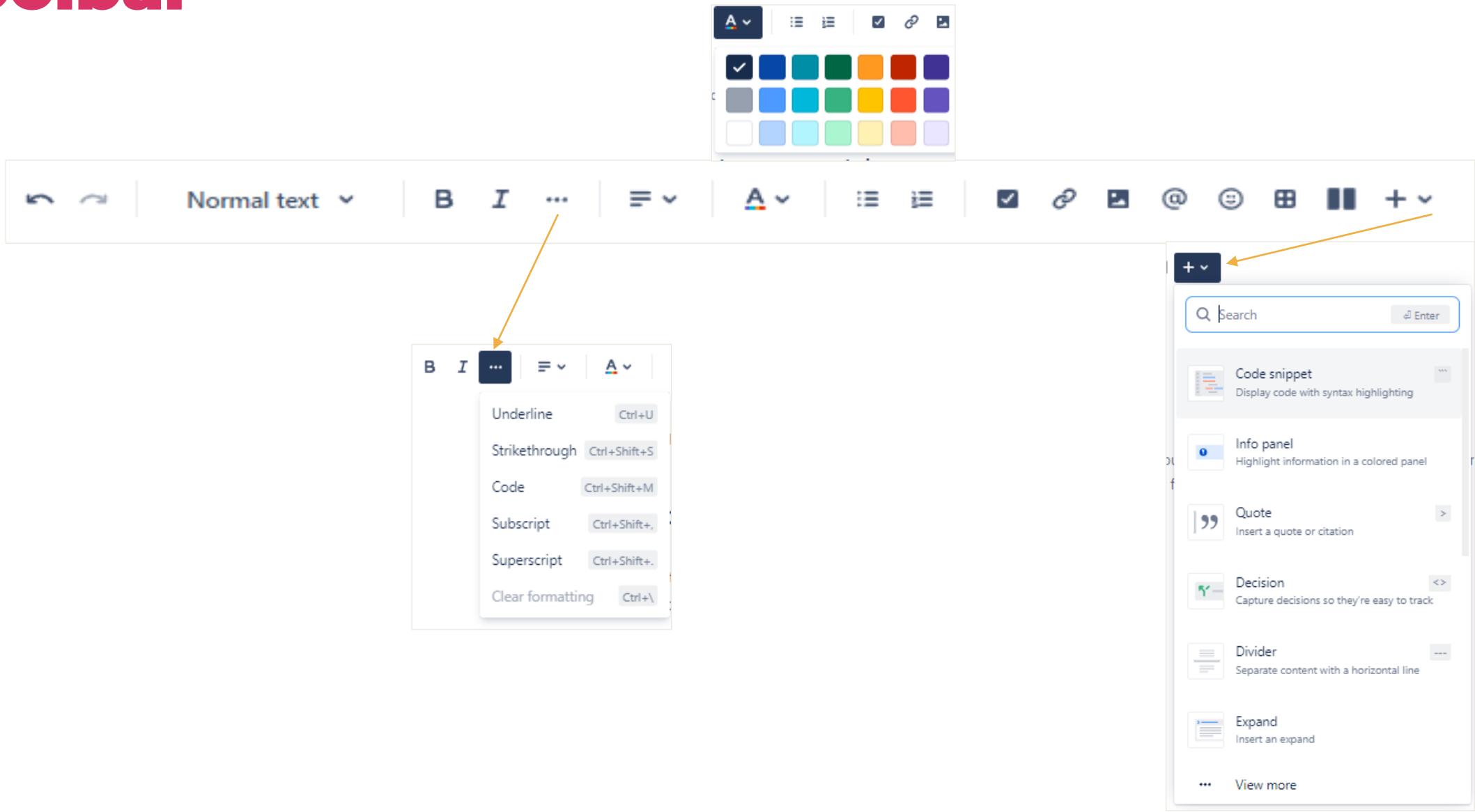
The toolbar has common **Microsoft** functionalities.

You can change your text with formatting options such as italics, bold, underline.

In addition to your standard formatting options, like bold and italics, you can change page layouts, add tables of contents, add and assign tasks, and display images, gifs, videos, and multimedia.



Toolbar



Toolbar

The far right of the toolbar lists the Publish options.

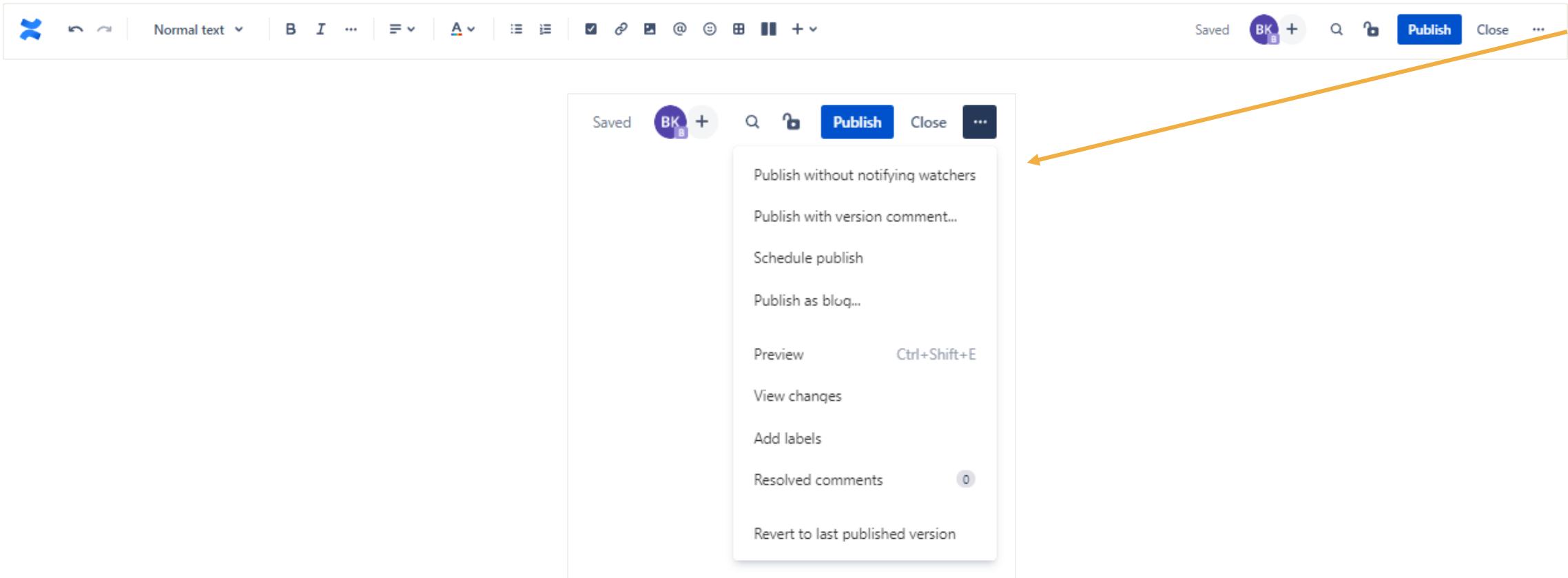
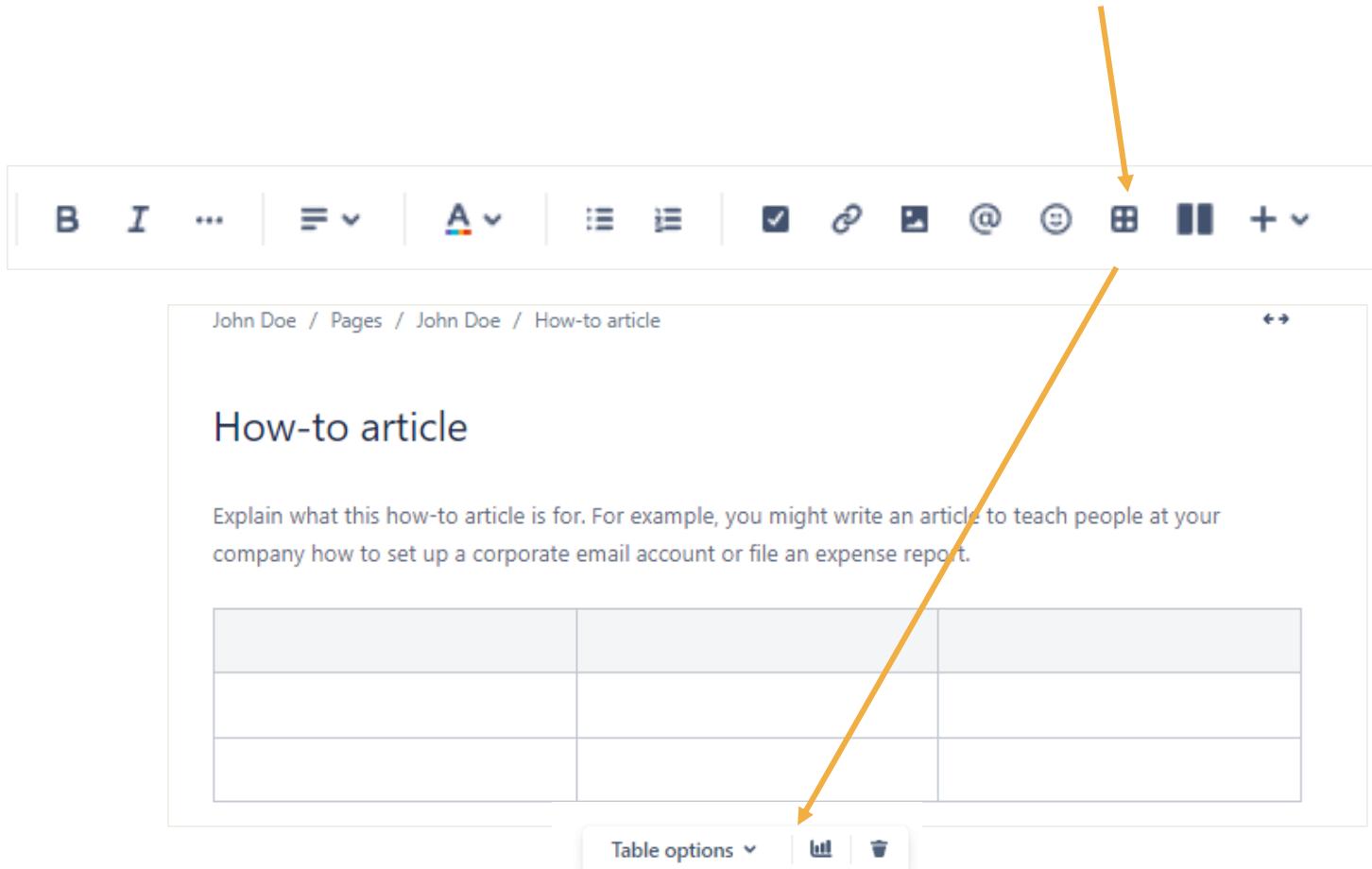


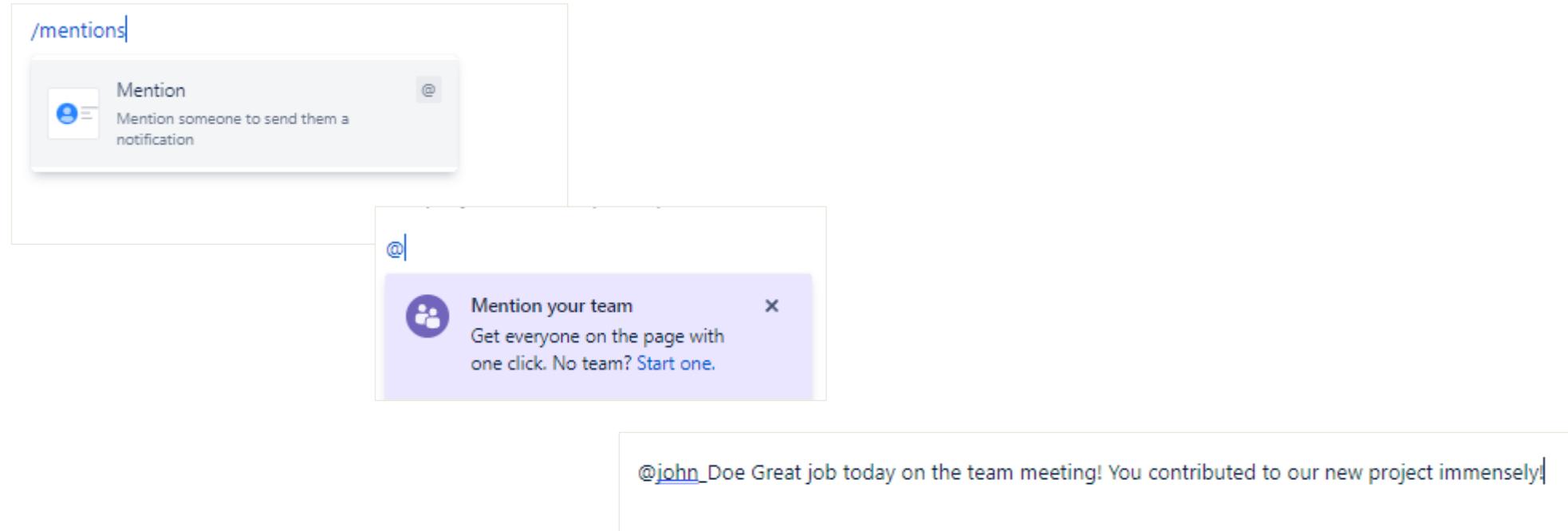
Table Creation

Add a table into a page by selecting the table in the top toolbar.



Mentions

Mention a team or individual with this option. This is a great tool for assigning a task or work and to recognize someone.



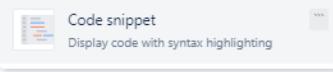
Code Snippet

You can format source code with numbered rows and syntax highlighting based on the language you choose. Type /code or /code snippet to quickly add this element from the slash command.

How-to article

Explain what this how-to article is for. For example, you might write an article to teach people at your company how to set up a corporate email account or file an expense report.

/codesnippet



The screenshot shows a rich text editor interface. A red box highlights the command '/codesnippet'. A dropdown menu is open, showing a single option: 'Code snippet' with the subtitle 'Display code with syntax highlighting'. There is also a small '...' button next to the menu.

John Doe / Pages / John Doe / How-to article

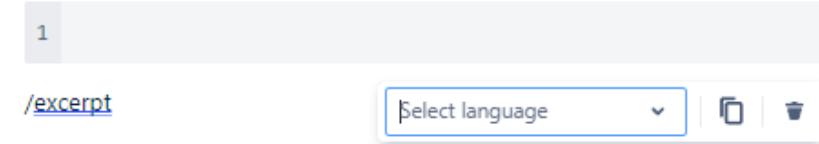
How-to article

Explain what this how-to article is for. For example, you might write an article to teach people at your company how to set up a corporate email account or file an expense report.

1

/excerpt

Select language ▾



The screenshot shows a rich text editor interface. A red box highlights the command '/excerpt'. To the right of the command is a 'Select language' dropdown with a downward arrow. Below the command are two small icons: a clipboard and a trash can. The text area above the command contains the number '1'.

Let's take a look at page templates for common situations like meeting notes, task reports and troubleshooting articles.

Meeting Notes

There are five types of meeting templates including One-on-one, all hands, remote, sprint planning, weekly meetings and included in this search is the meeting notes template for support of the meeting you chose.

The screenshot shows a search interface for meeting templates. The search bar at the top contains the text "meeting". Below the search bar, there are filter options: "All 6" (selected), "Business strategy 1", "Human resources 1", "Personal 1", and a "Recommended" dropdown. The search results are displayed in a grid:

Template Type	Category	Description	Sub-Type
1-on-1 Meeting	Startup	1-on-1 Meeting	
All hands meeting	Startup	All hands meeting	
Meeting notes	Teamwork	Meeting notes	
Remote team meeting	Startup	Remote team meeting	
Sprint planning meeting	Software development / IT	Sprint planning meeting	by Jira
Weekly meeting notes	Teamwork	Weekly meeting notes	

Task Reports

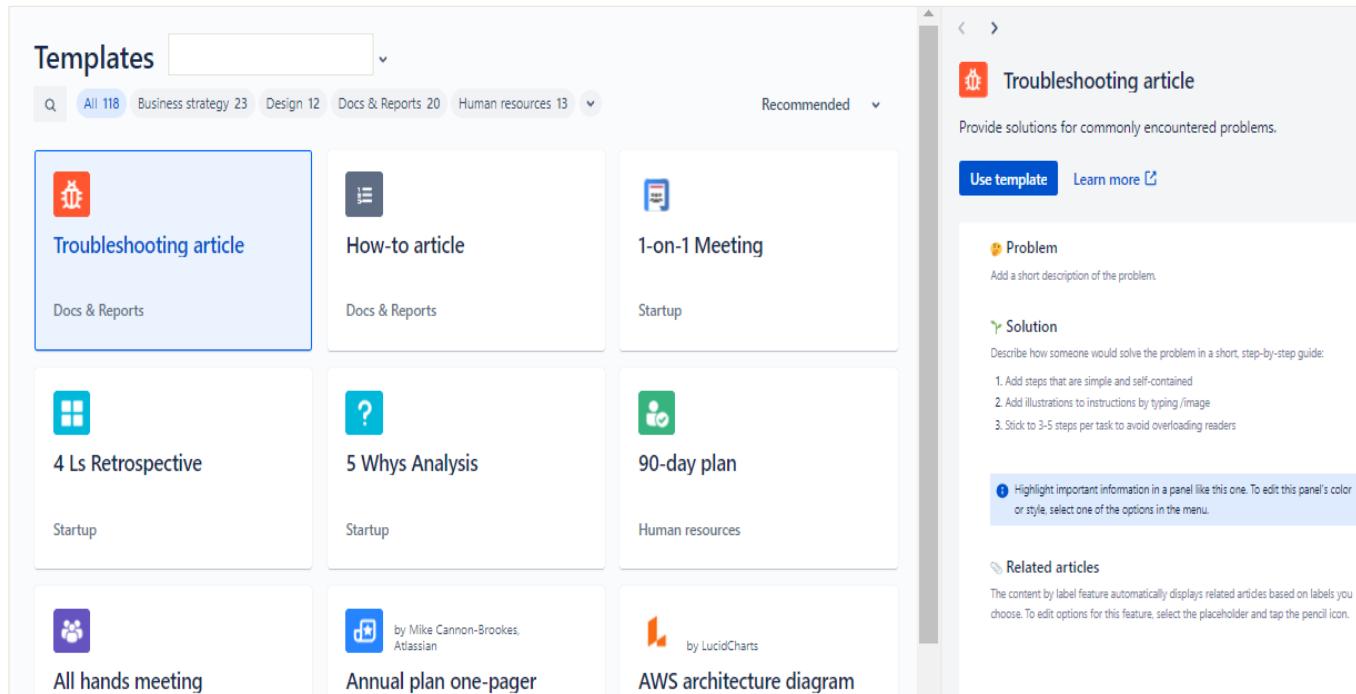
There are multiple types of task reports, including Project task reports, team task reporters and general task reports.

The screenshot displays a user interface for selecting templates. At the top left is a search bar containing the text "task". To its right are buttons for "All 5", "Docs & Reports 4", and "Marketing & Sales 1". Further right is a dropdown menu set to "Recommended". Below the search bar, there are six template cards arranged in two rows of three. The first row includes "How-to article" (under Docs & Reports), "Marketing campaign" (under Marketing & Sales), and "Project Task report" (under Docs & Reports). The second row includes "Task report" (under Docs & Reports) and "Team Task report" (under Docs & Reports). The "Project Task report" card is highlighted with a blue border, indicating it is the selected or recommended template.

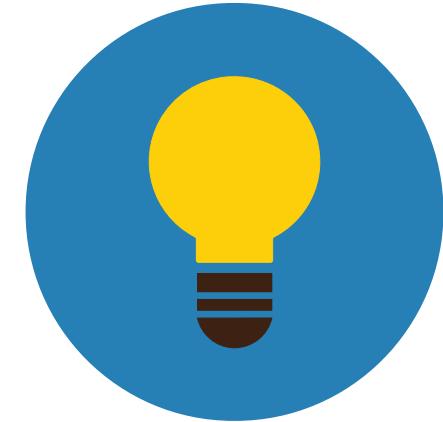
Category	Template Type	Description	Category		
Docs & Reports	How-to article		Marketing & Sales	Marketing campaign	
	Project Task report			Task report	
Docs & Reports	Team Task report		Marketing & Sales		

Troubleshooting Articles

In a troubleshooting article, you will find a location to list the problem and the step-by-step solutions, already built out in this template.



The screenshot shows the Microsoft Word ribbon at the top with the 'File' tab selected. Below the ribbon is a search bar and a 'Templates' dropdown menu. Underneath are category filters: 'All 118', 'Business strategy 23', 'Design 12', 'Docs & Reports 20', and 'Human resources 13'. A 'Recommended' dropdown menu is open. On the left, there's a sidebar titled 'Templates' with a search bar. Below it are several template cards: 'Troubleshooting article' (selected, shown in preview), 'How-to article', '1-on-1 Meeting', '4 Ls Retrospective', '5 Whys Analysis', '90-day plan', 'All hands meeting', 'Annual plan one-pager', and 'AWS architecture diagram'. The 'Troubleshooting article' card has a blue border and is detailed in the preview pane on the right. The preview pane title is 'Troubleshooting article' with a gear icon. It says 'Provide solutions for commonly encountered problems.' and has a 'Use template' button. The preview shows sections for 'Problem' (with a note to add a short description) and 'Solution' (with a note to describe how someone would solve the problem). It also includes a tip about highlighting important information and a 'Related articles' section.



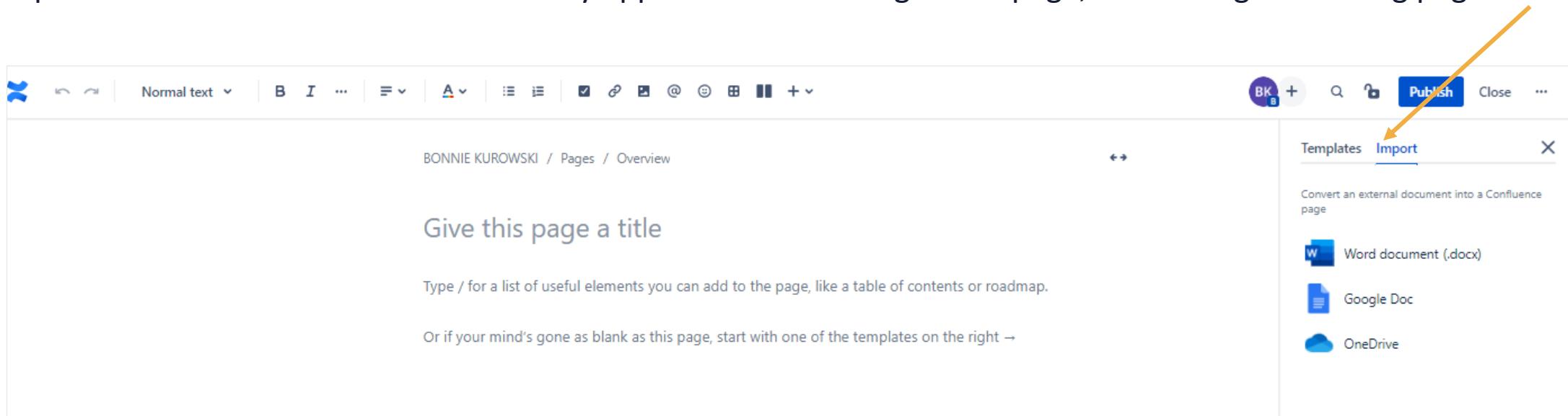
If you do not like these templates, there is a way to develop things in Microsoft Word and import them as well.

Importing

You can create a document then import the below document types directly into a Confluence page :

- a MS Word document
- a Google Doc file
- OneDrive file

The new Import feature is located in the right box inside of the new Confluence editor, side by side with the new Templates feature. Please note this will only appear when creating a new page, not editing an existing page.



Questions?



Take a 10-minute break!

In this section you will learn how to work with team members by:

1. Execute creating and editing space pages together,
2. Stay in contact, manage, and interact with team members
3. Create decision logs to work through projects with key stakeholders.

Team Editing Abilities

Up to 12 teammates can edit your page at the same time, live. This allows you to gather input from all your team members or a select few. Hit the **Invite** button in the editor or enter some people or groups to invite by email.

- Collaborative editing lets you and your team work together in real time on software requirements, meeting notes, retros, and any other Confluence page.
- Changes save and sync automatically, so everyone editing sees the same thing at the same time, in real time.



Done Editing

Once you and your team are done editing you can:



Publish (or update if the page has previously been published) to make everyone's changes visible



Revert to the published version of the page, discarding everyone's unpublished changes



Close the editor and **keep** everyone's work to finish later



Delete the draft page entirely, if it has never been published.

The system will warn you if you're about to publish (or discard) other peoples' changes along with your own.

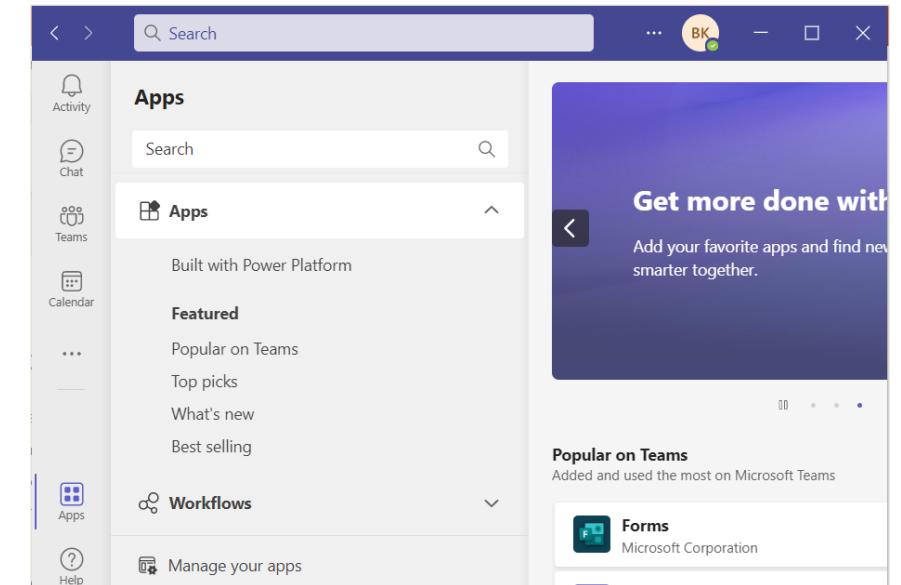
Staying in Contact, managing and interacting with others

Confluence is a platform that allows you to stay in contact, manage and interact with your team and others.

For example, you can plug in other platforms such as:

- **Microsoft Teams** for Instant Messaging capabilities.
- **Jira** for Project Management tools.

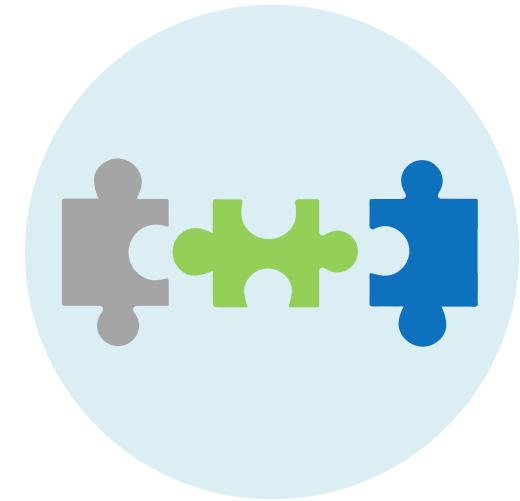
You can work within Confluence to build an informative team homepage, built and manage a project plan, keep projects on track, loop in stakeholders, and even assess, track and celebrate success.



Other software

Here are some of the things you can do!

- Connect Microsoft Teams for Confluence integrates Confluence with Microsoft Teams - together with Jira, Microsoft Planner and Microsoft Outlook!
- Link Confluence pages to Teams channels.
- Use the Bot with different commands for your tasks and content, e.g., list your current Tasks from Jira, Planner, Outlook and Confluence.
- Add Teams messages directly to Confluence pages.
- Search Confluence Pages/Blog Posts directly from Microsoft Teams.
- Use several Confluence Macros to show your To-dos, where you have been mentioned and for content-changes of pages you're watching.
- Send Notifications from Confluence to Teams channels incl. rich-text messages with images.
- Enable your personal assistant to be notified about urgent To-Dos from Confluence, Jira, Planner and Outlook.



Tips to Keep your Team Communicating

- Use interactive templates
- Mentions bring more people to see the conversations
- Allow the use of emojis
- Keep updated statuses posted
- Celebrate successes
- Socialize successes in blog posts

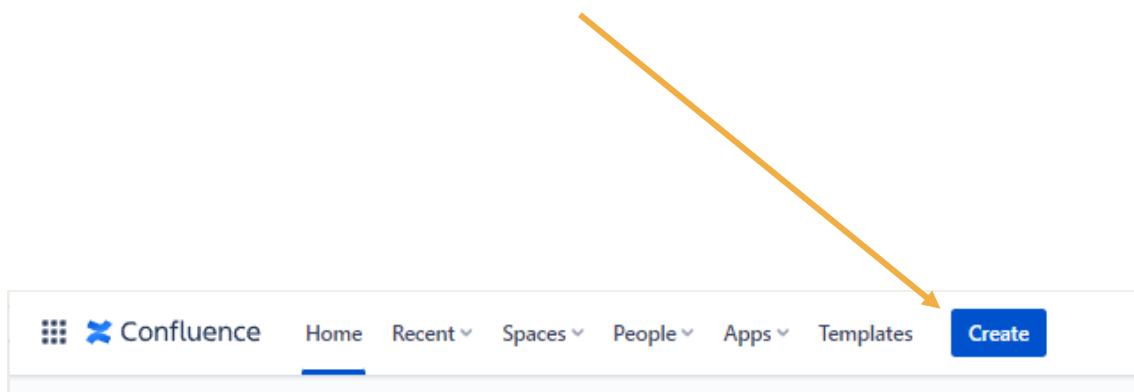


Start with a blueprint.

Creation Blueprint

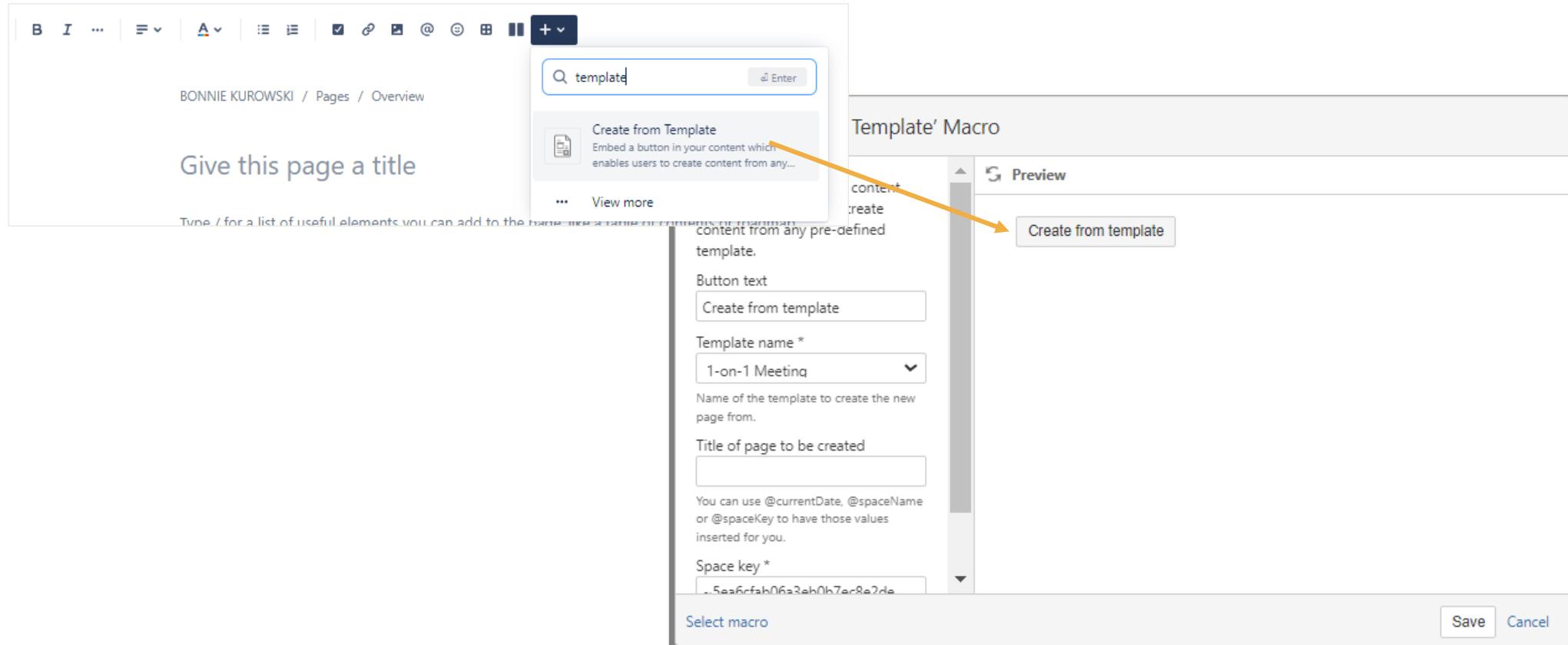
The Decisions blueprint helps you make decisions and record the outcomes with your team.

The first time you use the Decisions blueprint in a space, Confluence will create an index page and add a shortcut on your space sidebar (if you're using the default theme). The index acts as your Decision Log and lists all the decisions in that space.



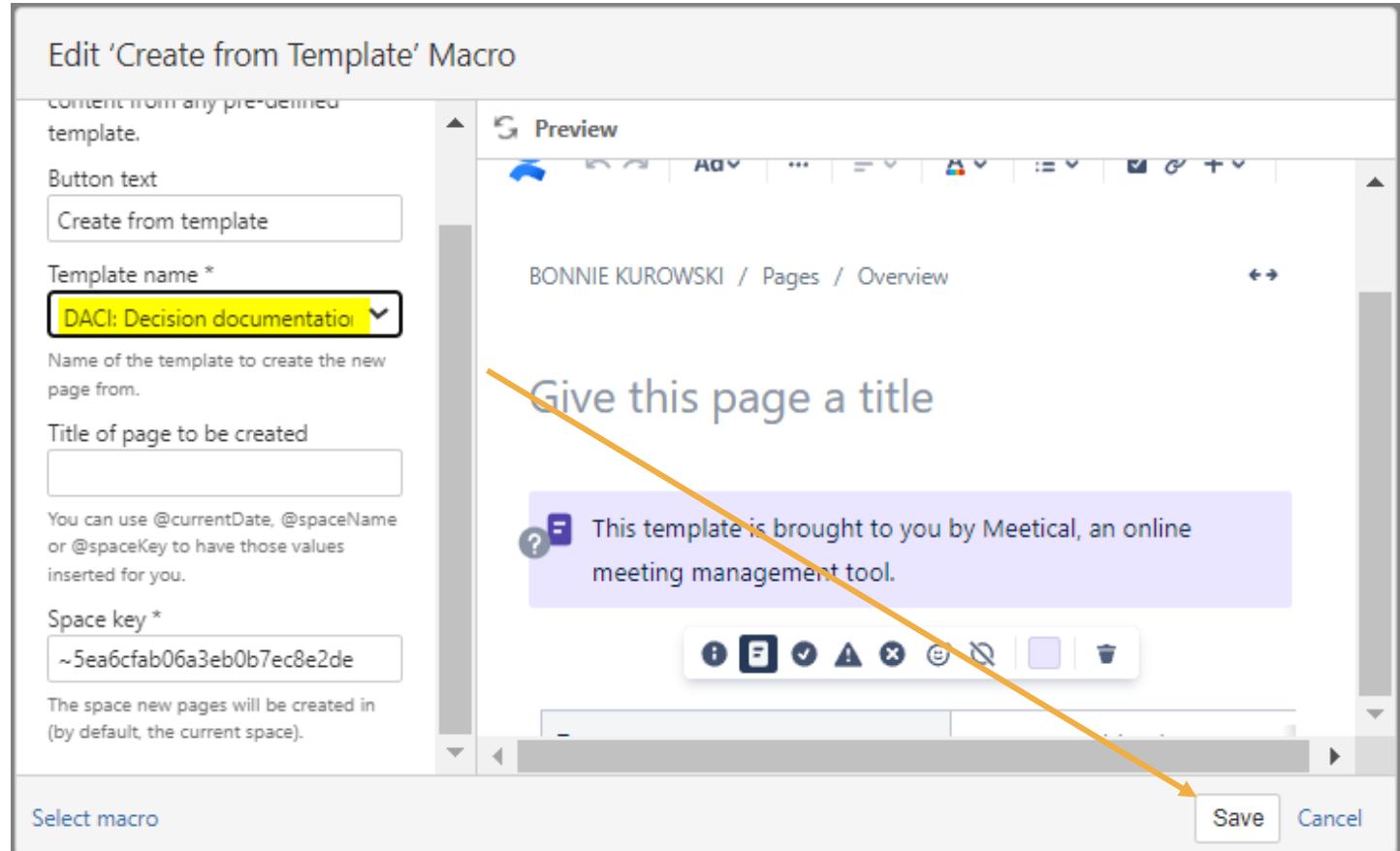
Create from Template

In the top toolbar, filter to template and select Create from Template.



Decision Selected

Using the dropdown, select the Decision option and click Save.



Decision Logs

Once you save your first decision page by clicking the “share” button, Confluence will create a decision log page for the space you're in and add a shortcut to it in the space's sidebar. The decision log **lists all the decisions in that space**.

The screenshot shows a Confluence space sidebar on the left and a decision log page on the right. The sidebar includes links for Overview, Blog, Space Settings, Add shortcut, Pages, and Sample Test. The Sample Test link is highlighted with a blue box and has an orange arrow pointing from the sidebar to the decision log page. The decision log page title is "Sample Test". It shows a table with two rows of data:

Date	Resource	Decision
07/10/2022	Mary	Remove item from list
07/11/2022	Joe	Add four new items to list

Below the table, there are buttons for "Be the first to add a reaction" and "Write a comment...".

Questions?

In this section you will learn how to Configure Spaces by:

- 1.** Customize default page templates and themes
- 2.** Edit language and regional settings
- 3.** Secure your space access and permissions
- 4.** Check site logs

Customize Default Page Templates & Themes

Default space templates are different from ordinary page templates in that they don't present the user with a form to complete, so variables should be limited to those listed in the **Variables** menu.

The following variables are available to be added to the default space content templates.

- \$spaceKey inserts the space key into the site space overview
- \$spaceName inserts the space name into the site space overview
- \$userFullName inserts the user into the personal space overview
- \$userEmail inserts the email address of the user into the personal space overview



Customize a Default Page Template:

STEP 1: Select the settings wheel 

Customize Default Page Templates & Themes

On the left side of the page, you will see the Settings menu.

Confluence Home Recent Spaces People Apps Templates Create

Settings

SITE ADMINISTRATION

- User management
- Billing

CONFIGURATION

- General Configuration
- Further Configuration
- Languages
- Shortcut Links

Global Templates and Blueprints

Global page templates

Add global page template

There are no global templates at the moment.

Global page blueprints

What are Blueprints?

Template/Blueprint	Action
Service team health monitor	Disable Edit
ITSM change management	Disable Edit
Product Requirements Blueprint	Disable

Global Templates and Bl...

STEP 2: Select Global Templates and Blueprints from the sidebar (under Configuration).

Customize Default Page Templates & Themes

Scroll down until you see the section titled System Templates.

System templates	
Default Space Content	Edit
Default Personal Space Content	Edit
Sample Pages	Edit
Default Welcome Message	Edit

STEP 3: Select **Edit** next to "Default Space Content" or "Default Personal Space Content"

(Depending on whether you want to customize the content for new site space or personal space overviews)

Customize Default Page Templates & Themes

Your new default blank page will be on your screen.

The screenshot shows a Confluence page titled "Default Space Content". At the top left, there's a breadcrumb navigation: "Administration / Templates". Below the title, there's a green callout box containing the text: "Welcome to your new space. Use it to create something wonderful. To start, you might want to: • Customise this overview using the edit icon at the top right of this page. • Create a new page by clicking the + in the space sidebar, then go ahead and fill it with plans, ideas, or anything else your heart desires." Below this box is a toolbar with various icons. At the bottom of the page, there's a blue sidebar with the heading "Need inspiration?" and a list of three items: "Get a quick intro into what spaces are, and how to best use them at [Confluence 101: organize your work in spaces](#). Check out our guide for ideas on how to [set up your space overview](#). If starting from a blank space is daunting, try using one of the [space templates instead](#)".

STEP 4: Enter the content that you want to appear on the overview for new blank spaces.

Hint: You can add variables, macros, and other content in the same way as editing a page template.

Customize Default Page Templates & Themes

Design your content and when done, remember to save your new page! Now you know how to customize the default page templates. Let us look at how to customize themes.



The screenshot shows a user interface for managing space content. At the top, there's a toolbar with various icons for bold, italic, lists, and other document operations. To the right of the toolbar is a search bar with a magnifying glass icon. Below the search bar are two prominent buttons: a blue 'Save' button and a white 'Cancel' button with black text. A large orange arrow points from the text 'STEP 5: Select Save.' to the 'Save' button. The main content area has a light green background. It features a section titled 'Welcome to your new space' with a checkmark icon. Below this, a message encourages users to 'Use it to create something wonderful.' Underneath, a heading 'To start, you might want to:' is followed by a bulleted list: 'Customise this overview using the edit icon at the top right of this page.' and 'Create a new page by clicking the + in the space sidebar, then go ahead and fill it with plans, ideas, or anything else your heart desires.' At the bottom left, the text 'Testing...' is visible.

Administration / Templates

Default Space Content

STEP 5: Select Save.

Welcome to your new space

Use it to create something wonderful.

To start, you might want to:

- Customise this overview using the edit icon at the top right of this page.
- Create a new page by clicking the + in the space sidebar, then go ahead and fill it with plans, ideas, or anything else your heart desires.

Testing...

Customize Default Themes

You can customize your theme in the General Configuration Tab.

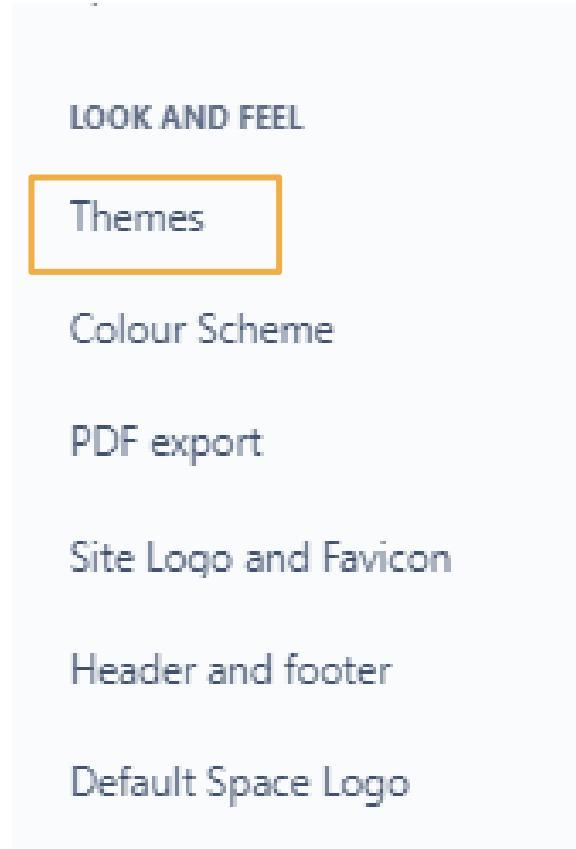
The screenshot shows the Confluence General Configuration page. On the left, there's a sidebar with 'Settings' and 'CONFIGURATION' sections. Under 'CONFIGURATION', 'General Configuration' is highlighted with a blue arrow. At the top right, there's a search bar and a row of icons including a gear (Configuration), a question mark (Help), and a bookmark (BK). The main content area is titled 'General Configuration' and 'Site Configuration'. It shows the 'Site Title' set to 'Confluence'. Below it, there's a 'Contact Administrators Message' field with placeholder text about reporting errors. There's also a checkbox for 'Contact Administrators Form'. A yellow arrow points from the 'General Configuration' link in the sidebar to the 'General Configuration' link in the main content area.

Customizing Themes:

STEP 1: Cog icon > General Configuration.

Customize Default Themes

You can customize by Themes, Colour Scheme, even logos.



STEP 2: The administration console loads. In the left-hand sidebar, under Look & Feel, click Themes .

Customize Default Themes

If you have a theme, it will appear here, and you can select it. This one is using the “default theme”. Notice the Helpful Tips on the right. This can help you to load your plugin to install a theme if needed. Now you know where to customize a default theme!

Site Theme

Current Theme

The current theme controls the layout and colours of this space.



Default Theme

This is the original Confluence look and feel. Page content spans the full width of the screen.

Choose New Theme

To change the default theme of this Confluence site, select one below:

No themes could be found. If you have a theme plugin installed, ensure that it is correctly placed in the Application Server classpath, and that its theme module is enabled in the plugin configuration.

[Confirm](#)

Help Tips

Themes are Confluence plugin modules that customise the look of the site.

If you select a theme, then any colours or page layouts defined in that theme will be applied across the whole Confluence site.

If you do not select a theme, the default look and feel will be applied, or you may customise the site's appearance manually through colour-scheme and layout customisation.

Space administrators may select a different theme for their spaces.

[More about Themes](#)



Languages Regional Settings

Editing Language and Regional Settings

If you have teams who speak different languages or need a different regional setting, you can guide them to change their settings. To do this, you would first select the Settings Icon.

The screenshot shows the Confluence General Configuration page. At the top, there is a navigation bar with icons for Home, Recent, Spaces, People, Apps, Templates, a search bar, and a settings icon (a gear) which is highlighted with a yellow box. The main content area has two columns. The left column is titled "Settings" and contains sections for "SITE ADMINISTRATION" (User management, Billing) and "CONFIGURATION" (General Configuration, Further Configuration, Languages, Shortcut Links). The "General Configuration" link is currently selected and highlighted with a grey box. The right column is titled "General Configuration" and contains a "Site Configuration" section with a "Site Title" field set to "Confluence". Below it are fields for "Contact Administrators Message" and "Contact Administrators Form". A small "Edit" button is located in the top right corner of the Site Configuration section.

```
or_mod = modifier_obj
mirror object to mirror
or_mod.mirror_object =
operation == "MIRROR_X":
or_mod.use_x = True
or_mod.use_y = False
or_mod.use_z = False
operation == "MIRROR_Y":
or_mod.use_x = False
or_mod.use_y = True
or_mod.use_z = False
operation == "MIRROR_Z":
or_mod.use_x = False
or_mod.use_y = False
or_mod.use_z = True

lection at the end -add
ob.select= 1
r_ob.select=1
text.scene.objects.active
Selected" + str(modifier
rror_ob.select = 0
opy.context.selected_o
ta.objects[one.name].se
nt("please select exactly
- OPERATOR CLASSES -->
ypes.Operator):
X mirror to the selected
ject.mirror_mirror_x"
or X"
ontext):
ext.active_object is not
```

Languages Regional Settings

Editing Language and Regional Settings

Select the General Configuration tab on the left of the screen.

The screenshot shows the Confluence administration interface. The top navigation bar includes Home, Recent, Spaces, People, Apps, Templates, and a search bar. On the far right are icons for notifications, help, settings, and a bookmarklet. The left sidebar is titled 'Settings' and contains sections for Site Administration (User management, Billing) and Configuration (General Configuration, Further Configuration, Languages, Shortcut Links). The 'General Configuration' section is highlighted with a yellow box. The main content area is titled 'General Configuration' and contains a 'Site Configuration' section. It shows the 'Site Title' is set to 'Confluence'. Below it is a 'Contact Administrators Message' field with placeholder text: 'Please enter information about your request for the site administrators. If you are reporting an error please be sure you include information on what you were doing and the time the problem occurred.' There is also a checkbox for 'Contact Administrators Form' and a note stating: 'Display a contact form when trying to contact the confluence-administrators. This can only be turned off if there is a custom contact administrator message.'



Languages

Editing Language and Regional Settings

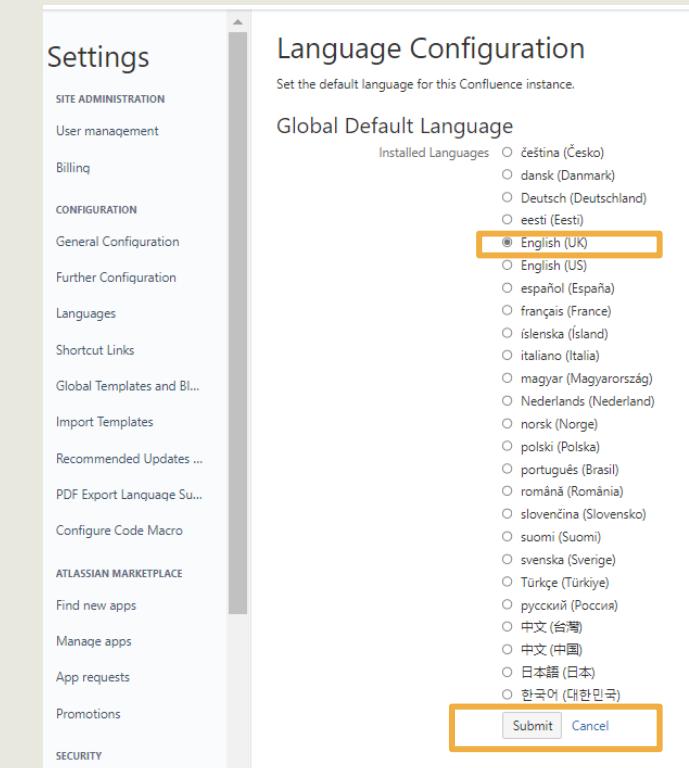
Select Languages in the left panel and the Edit button.

The screenshot shows the Confluence Settings page. The left sidebar has sections for SITE ADMINISTRATION (User management, Billing), CONFIGURATION (General Configuration, Further Configuration), and ATlassian MARKETPLACE (Find new apps, Manage apps). The **Languages** section is highlighted with an orange box. The main content area is titled **Language Configuration** with the sub-instruction **Set the default language for this Confluence instance.**. It shows a list of **Installed Languages** with their respective names in parentheses: čeština (Česko), dansk (Danmark), Deutsch (Deutschland), eesti (Eesti), English (UK), English (US), español (España), français (France), íslenska (Ísland), italiano (Italia), magyar (Magyarország), Nederlands (Nederland), norsk (Norge), polski (Polska), português (Brasil), română (România), slovenčina (Slovensko), suomi (Suomi), svenska (Sverige), Türkçe (Türkiye), русский (Россия), 中文 (台灣), 中文 (中國), 日本語 (日本), and 한글 (대한민국). An **Edit** button is located at the bottom right of the language list, also highlighted with an orange box.

Languages Regional Settings

Editing Language and Regional Settings

Select Languages and click the Submit button.





Secure your space access and permissions- **Proper security begins with a solid security plan.**

Identify Stakeholders/ Administrators

One of the most important things that cloud adaptors can do is to identify stakeholders who will help manage their services and accounts and enforce proper user hygiene.

- The always-on nature of SaaS applications like Confluence and Slack means that investing in stakeholders who have the time and resources to serve as administrators for these applications is critical.
- Active administrators will be your first line of defense in securing your spaces and enforcing your data policies.
- Without active administrators serving as your organization's eyes and ears, managing and enforcing proper user behavior as well as proper access restrictions will prove to be difficult.



Understand the interplay between permissions levels and restrictions

- Confluence provides permissions controls at multiple levels and understanding this is key to making sure that no one is authorized to view, add, modify, export, or delete data in Confluence.
- Users may also have the ability to control who views content that they've created.
- Ultimately, it's up to administrators to determine the "order of operations" for which specific controls apply to your organization's environment.
- Having an idea of where you'll need controls – whether at the product level, site level, or organization level – will help make sense of how to set up these roles for your organization.
- Beyond this, you'll need to ensure that the admins who have access to your Confluence admin console understand how permissions function in Confluence.

All paid instances of Confluence have three levels of permissions:

- Global permissions which are broad and site-wide
- Space permissions which uniquely apply to the space specified by an administrator (usually the space creator)
- Page restrictions which allow admins to restrict the view or editing of specified pages by specific groups or users

In general, administrators have the ability to apply permissions to an individual user or to a created group of users. It's important to note, though, that group permissions are additive within Confluence spaces.



Monitor logs to track permissions changes across your spaces

Confluence and Jira provide product-specific audit logs that administrators within those respective services can access.

1. Reviewing these logs can provide insight into who created or deleted a space or otherwise edited a space as well as changes to groups and user permissions.
2. Doing so will help in the moderating of Confluence spaces and the Atlassian organizations they're part of.

Properly onboard and offboard members

Finally, Confluence provides Admins to securely onboard new team members by only **inviting users** with a designated domain name in their email account.

Note: Organization admins who manage org-wide permissions should also be sure to remove employees who have left the company from the company's organization.





What else can organizations do to secure their Confluence spaces?

Data visibility is critical to cloud security.

- This involves knowing the types of data you have in your cloud environments, which also means knowing where it is and how it's being used.
- Ensuring that users abide by the access and permissions schemes in place is half the battle for organizations securing their cloud services and platforms.

The other half of this fight involves leveraging tools to illuminate where your data is and how it's being used.

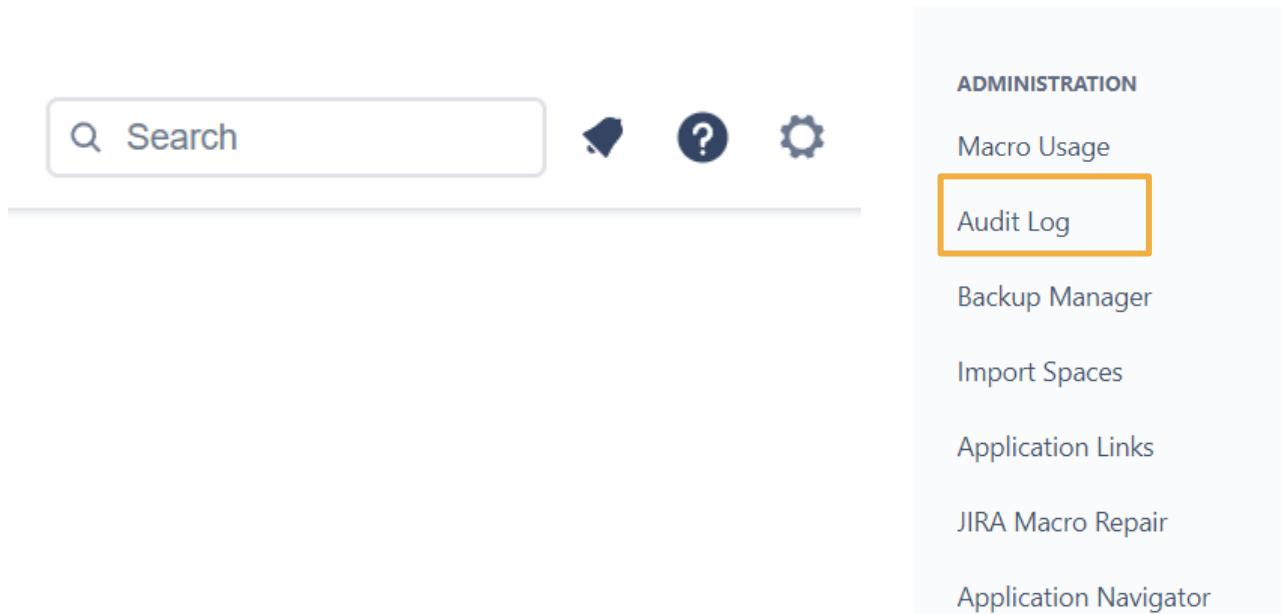
- Data discovery platforms like Nightfall can help with this. As the industry's first cloud-native data loss prevention solution, Nightfall integrates with popular SaaS platforms like Jira and Confluence to help companies discover, classify, and protect business-critical data within these environments.

Checking Site Logs

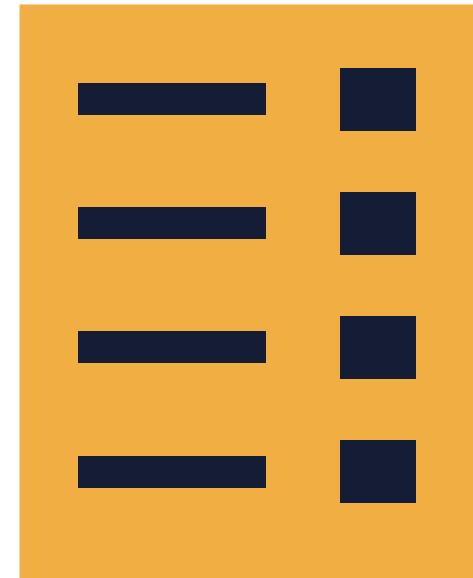
Site logs are valuable to determine what has happened on your pages.

The **audit** log allows administrators to look back at changes that have been made in your site.

This is useful when you need to troubleshoot a problem or if you need to keep a record of important events, such as changes to global permissions.



A screenshot of the Confluence navigation sidebar. At the top left is a search bar with a magnifying glass icon. To its right are three icons: a location pin, a question mark, and a gear. Below these are several menu items: "Macro Usage", "Audit Log" (which is highlighted with an orange border), "Backup Manager", "Import Spaces", "Application Links", "JIRA Macro Repair", and "Application Navigator".



To view the audit log, select  (Settings) in the Confluence navigation, then **Audit log**.

Filter the Audit Log

You can filter the log by keyword, settings, or click **Show More**.

Audit Log

The audit log gives you a history of changes to your Confluence site. It can be very useful for tracking down things like permissions, global settings, or add-on changes.

Filter by keyword  Filter by Time: All  Export 

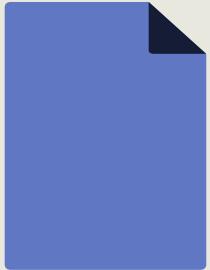
Prev 1 2 3 Next

Time	User	Event type	Change	Item affected	Actions
13 May, 2016 15:41:17	Administrator	Global Administration	Global settings changed		Show more
13 May, 2016 15:41:17	Administrator	Global Administration	Color scheme modified		Show more
13 May, 2016 15:41:17	Administrator	Global Administration	Site logo changed		Show more
13 May, 2016 15:39:16	Ewan User	Users and groups	User added to group	Group: developers	Show more
13 May, 2016 15:38:59	Ewan User	Users and groups	Group created	Group: developers	Show more
13 May, 2016 15:38:59	Ewan User	Users and groups	Group created	Group: developers	Show more
13 May, 2016 15:38:13	Administrator	Spaces	Space created	Space: Audit log space	Show more

- 1. Filter it:** dig into the log by keyword or by time.
- 2. More control:** export the whole log or change how long to keep events
- 3. Get detailed:** see the details of each change.

Audit Log Record Trail

The audit log records information about the following events.



Spaces

- Create and delete a space.
- Edit space details, theme, color scheme or stylesheet.
- Change space permission, including changing anonymous access.
- Export and import a space.
- Empty trash.



Global administration

- Modify global look and feel such as color scheme theme, site logo and favicon.
- Install, uninstall, enable or disable add-ons.



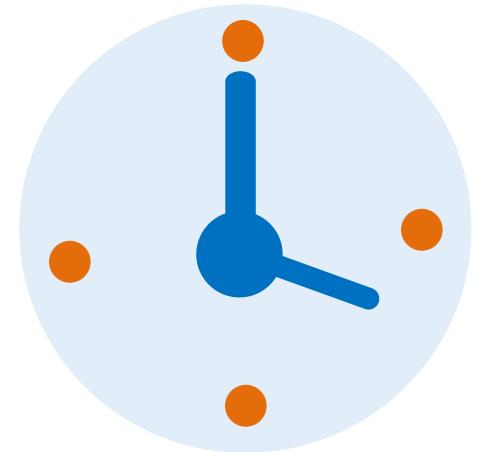
Users, groups and permissions

- Add, delete, deactivate or reactivate a user.
- Edit user details.
- Change group membership.
- Add or delete a group.
- Modify permissions for a user or group.
- Change global anonymous access.

Location of Log Information

The audit log doesn't record information directly relating to pages such as page edits (you can see these in the page history), location, or changes to page restrictions.

- Events are removed from the log, by default, after 90 days. You can choose to keep events for up to six months by adjusting the log settings.
- To retain a record of logs older than six months, or to explore the log in more detail, you can export the log to CSV format.



Questions?

In Summary:

You are now able to:

1. Navigate Confluence
2. Set Up & Manage Spaces
3. Work with Spaces
4. Work with Team Members
5. Configure Spaces





**Thank you for taking
this course.**