

What is Confluence?

Confluence is a wiki application (software designed for collaborative editing in a browser). Confluence is developed by the company Atlassian (also famous for the creation of the working collaboratively and issue-tracking tool JIRA) and allows users to work together using only a web browser. So, what are the differences between Confluence and JIRA?

Differences between Confluence and JIRA:

1. Confluence and JIRA are separate licenses (A JIRA license does not include A Confluence license);
2. Confluence serves as a digital brain for the organization (the entire work team can store workflows, documentation data, and much other organizational information) while JIRA serves as an issue-tracking and managing tool.

Confluence terms

Before concentrating on the interface it is vital to explain the necessary terms to use Confluence effectively.

Pages- the place where all of the content inside of Confluence will be present (text, images, tables, etc.).

Macros- dynamic content on pages (ex. connects JIRA with Confluence and all the changes are automatically transmitted from JIRA to Confluence and the other way round).

Spaces- the place where pages are situated.

A blog- is a type of content in Confluence that allows users to create and share articles, news updates, and personal insights. Blogs are usually shown in chronological order, with the most recent entry at the top.

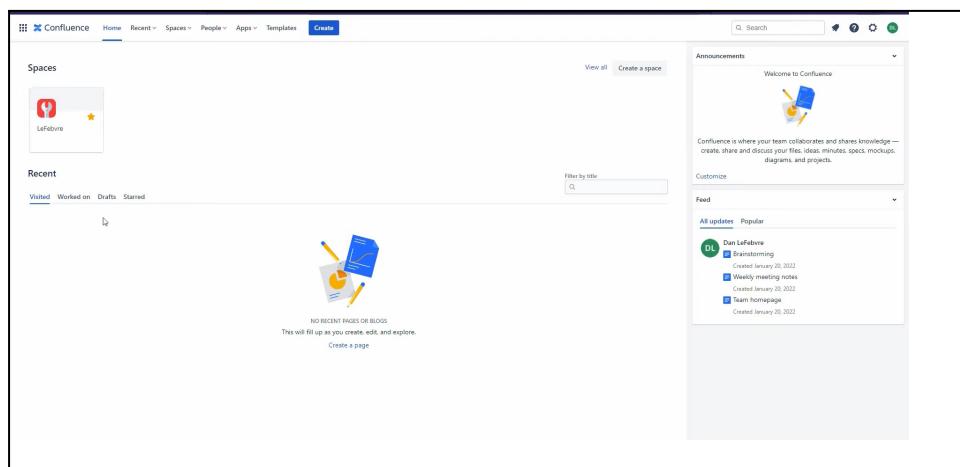
Permissions- Confluence has a strong permissions system in place that governs who may see, edit, and perform various activities on pages and spaces.

Administrators can set access levels to ensure that only authorized users can read and alter material.

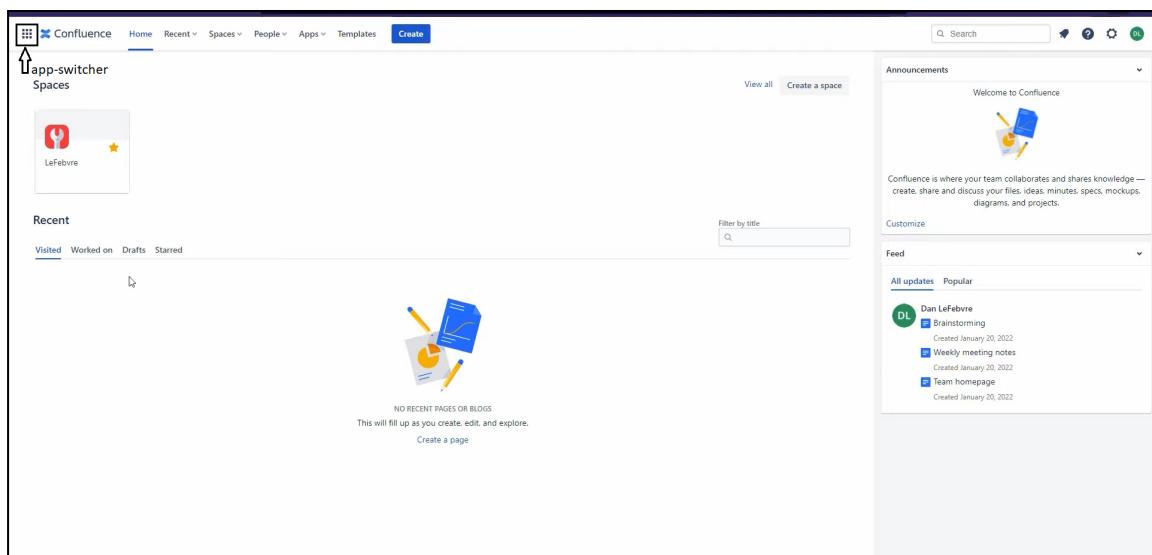
Confluence is a centralized knowledge repository that enables teams to capture, store, and retrieve useful information, documentation, and best practices. It promotes cooperation and reduces knowledge silos by facilitating knowledge exchange across departments, teams, and entire enterprises. So, it is pivotal to have an understanding of the Confluence interface and its main function for effective and fruitful work.

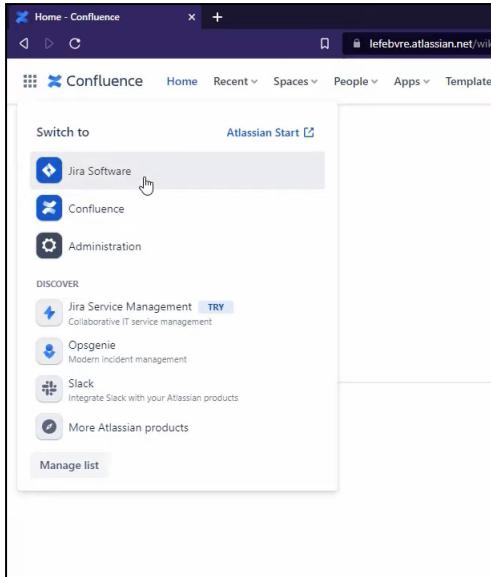
Confluence's interface

1. Home page

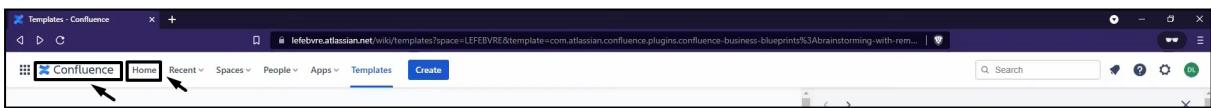


2. To switch between license products click the icon.

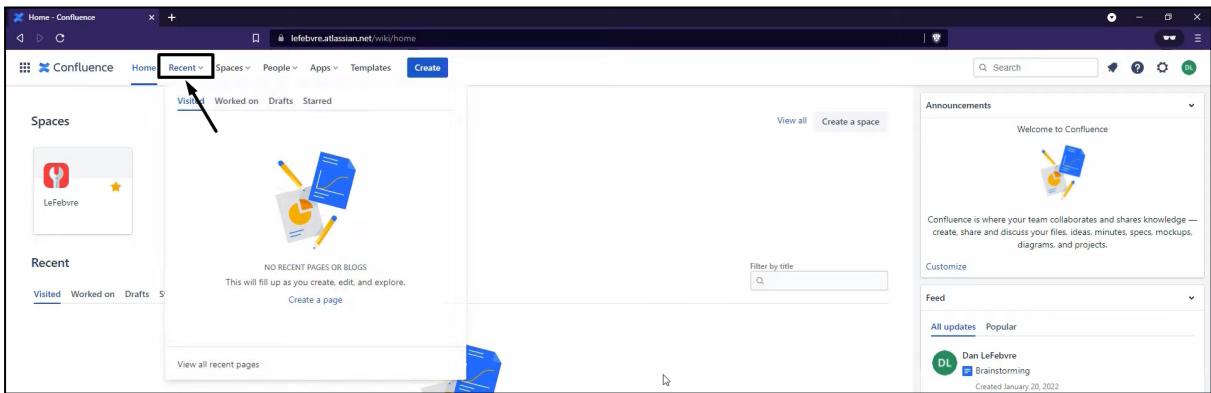




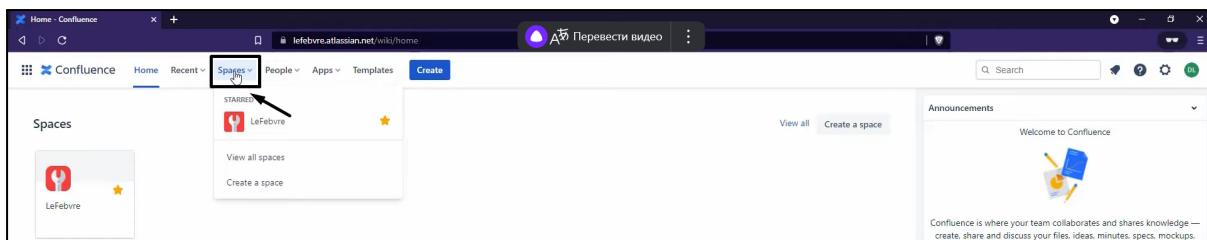
3. To come back to the home page click the **Confluence** or **Home** button.



4. To see the recent pages that you visited or things you have recently worked on click the **Recent** button (or you can see your recent works on your home page).



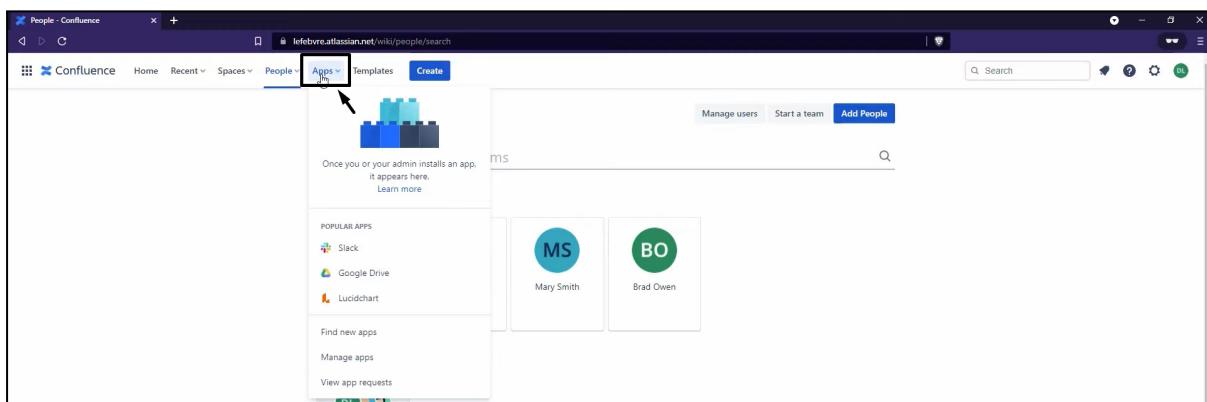
5. To find all of the spaces where you have worked recently, click the **Spaces** button (similar **Spaces** are located also on the home page).



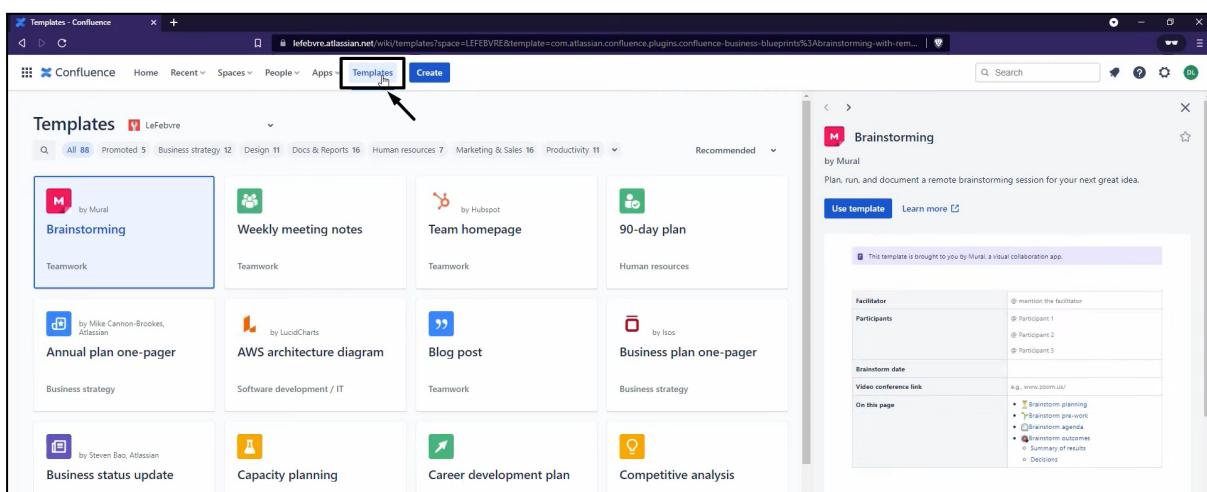
6. To search for people or find them among your Confluence installation or add people to your team, click the **People** button.

Note: When you add people to the Confluence installation be sure that this invitation works only for people who have access to the Confluence cloud. If you are not a Confluence administrator, the program sends a notification to a Confluence administrator for their approval.

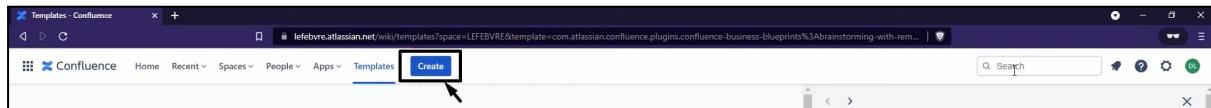
7. To add any other functionalities (e.g. Slack, Google Drive, Lucidchart, etc.), click the **Apps** button.



8. To create a page with a pre-built layout click the **Templates** button.



9. To create a new page click the **Create** button.



10. To search across Confluence click on the **Search** box.



Note: If you do not have access to some projects it will not be shown in your search (a page you do not have access to or you have a restriction from this page).

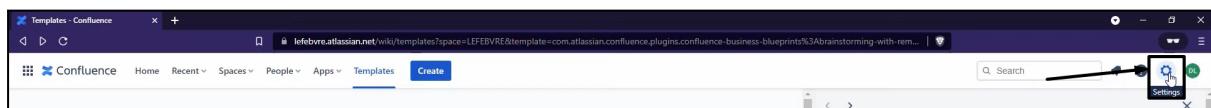
11. To see your notifications click the notification icon at the top-right corner of the screen.



12. To access Atlassian's documentation for Confluence click the  icon at the top-right corner of the screen.

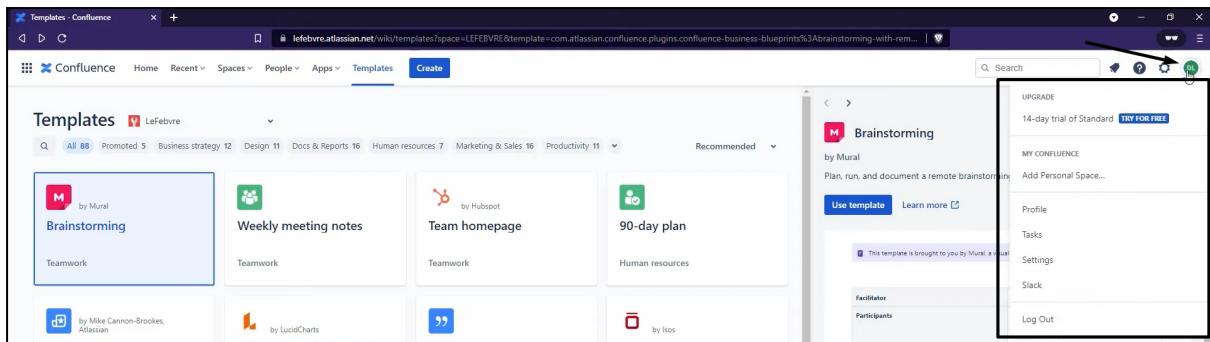


13. To see the Confluence settings click the  icon.



Note: If you do not see Settings it means you don't have permission to it.

14. To change your personal profile information (e.g. picture, password, etc.), click the  icon at the top right corner of the screen.



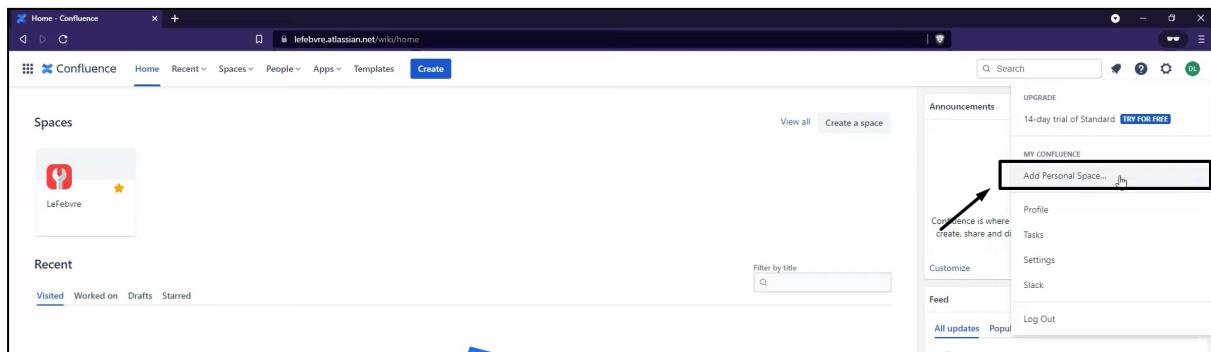
How to use personal spaces

Personal spaces (or also team spaces) are a way of organizing all the things you want to store. In Confluence the pages keep your content and all the content is situated in spaces. personal spaces can be created by any user. Team spaces are designed to be global across the entire company and need to be created by an admin. But both personal and team spaces can contain the same type of content (pages can contain images, text, etc.).

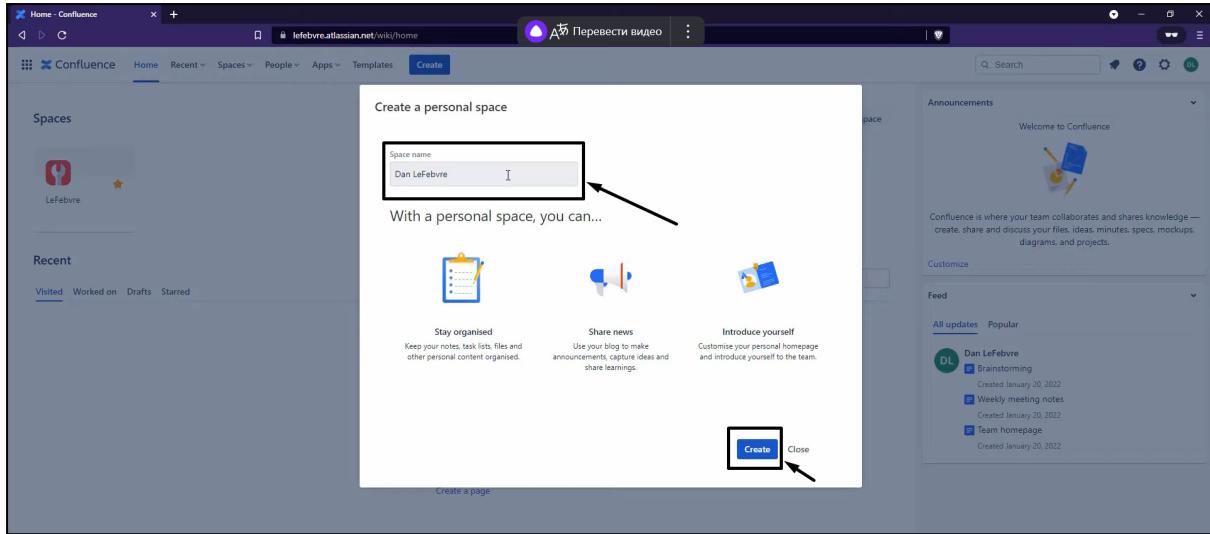
To create a personal space:



1. Click the icon and select **Add Personal Space** from the dropdown list.



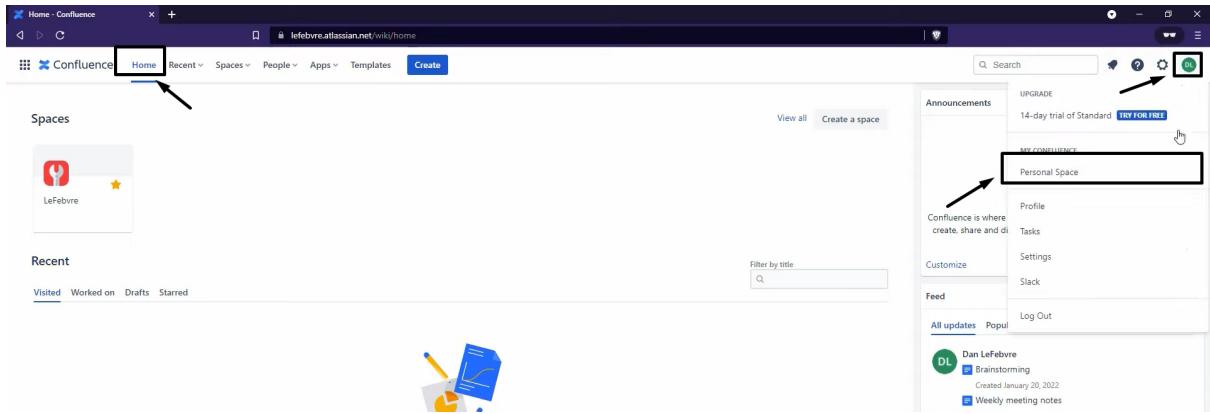
2. Write your name in the field and click the **Create** button.



The personal space is created.

How to come back to a created personal space

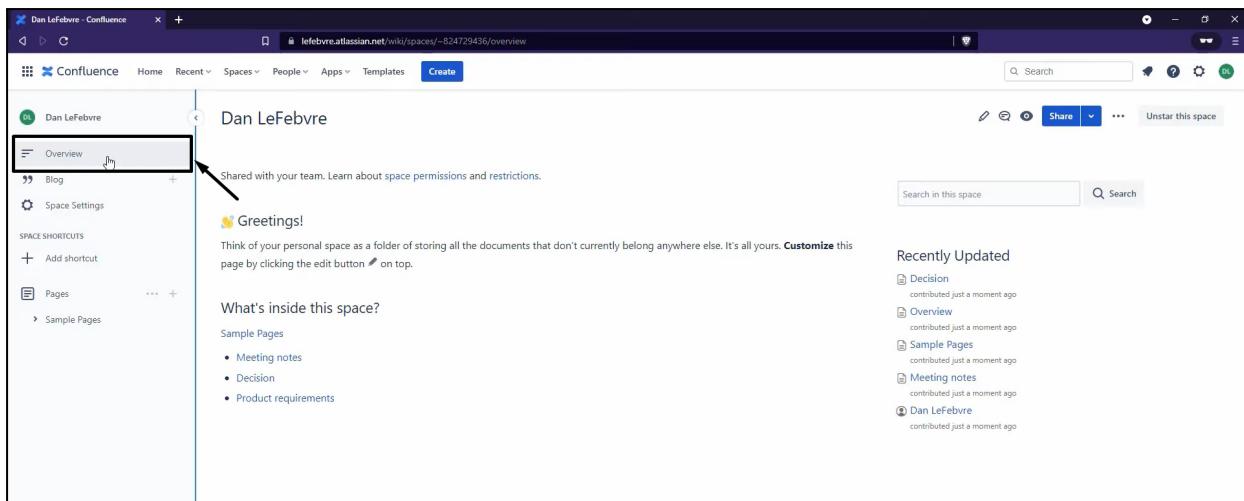
To come back to the created personal space click the **Home** button then the  icon and select **personal space** from the dropdown list.



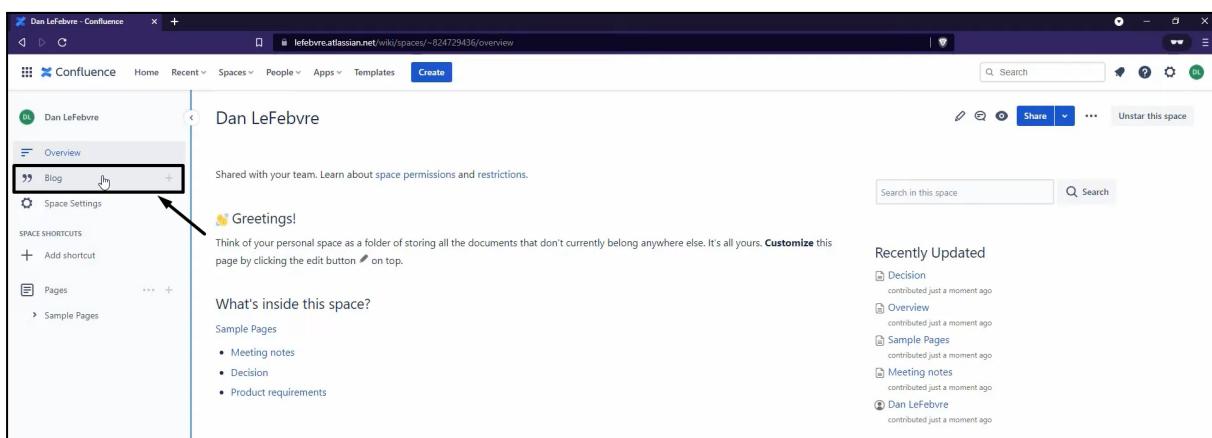
How to navigate a personal space

To navigate in the personal space:

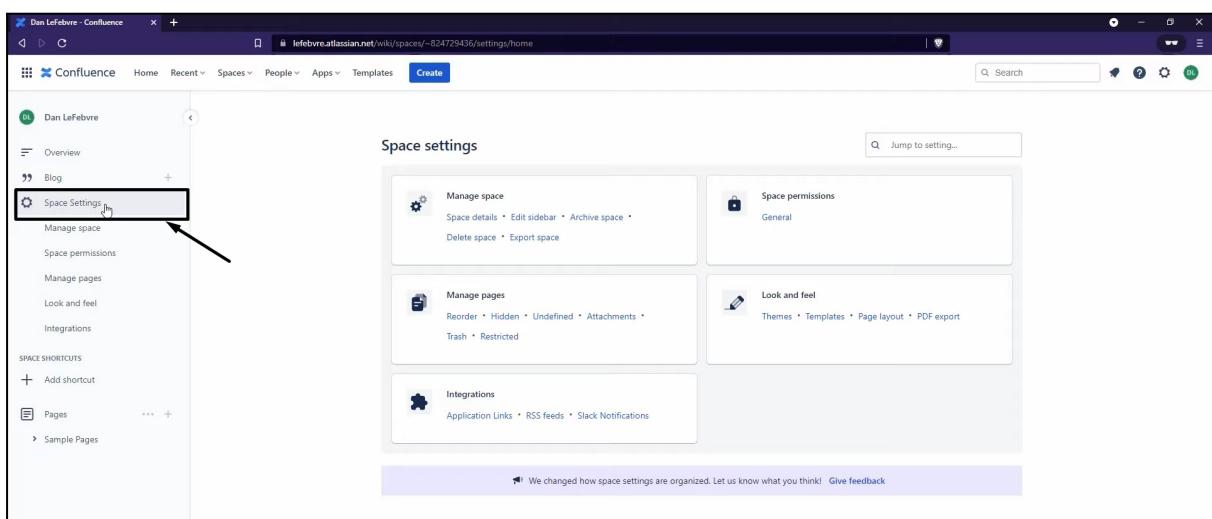
1. Click the **Overview** button at the left of the screen to see your page.



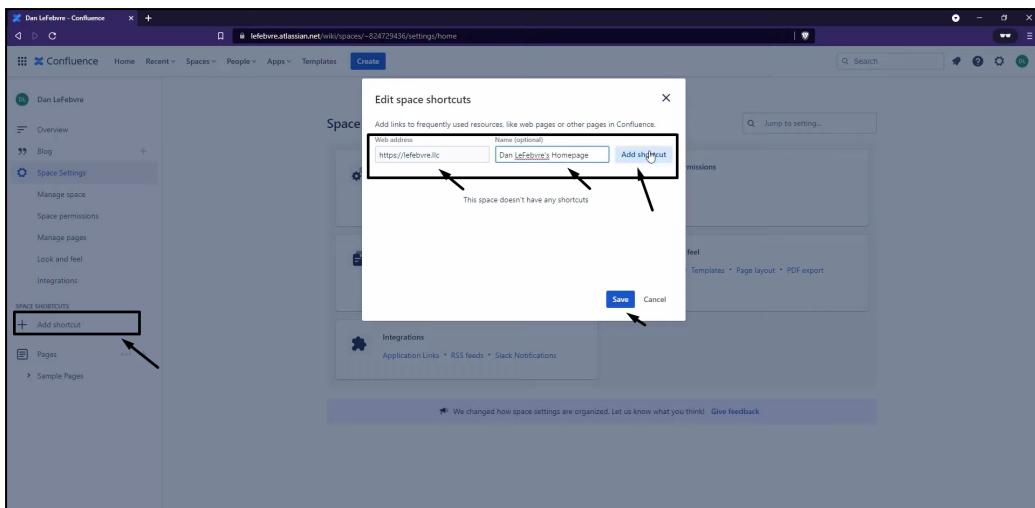
2. Click **Blog** to tide the date you have created.



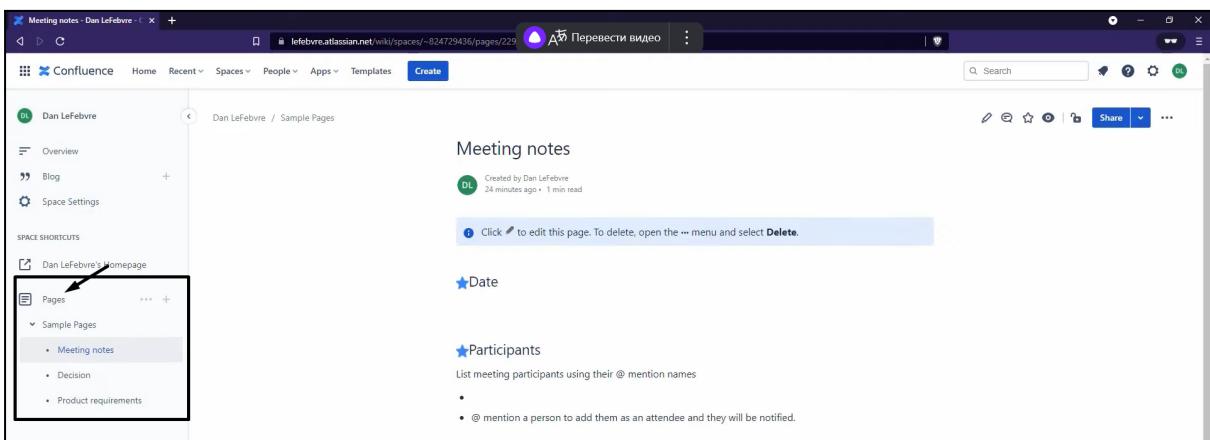
3. Click **Space Settings** to see the administrative permissions.



4. Click **Add shortcut** to add your frequently used web resources. In the appeared form type your **Web address** and **Name** click **Add shortcut** and then **Save**.



5. Click **Pages** to see the pages of your personal space.

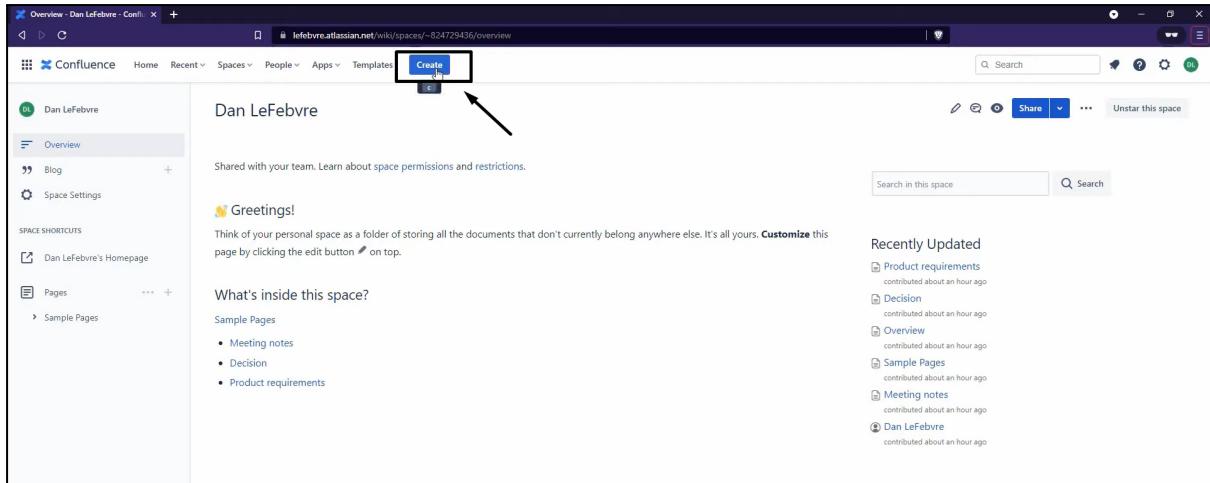


The navigation in the personal space has been described.

How to create pages in a personal space

To create a personal space:

1. Click the **Create** button at the top of the screen.



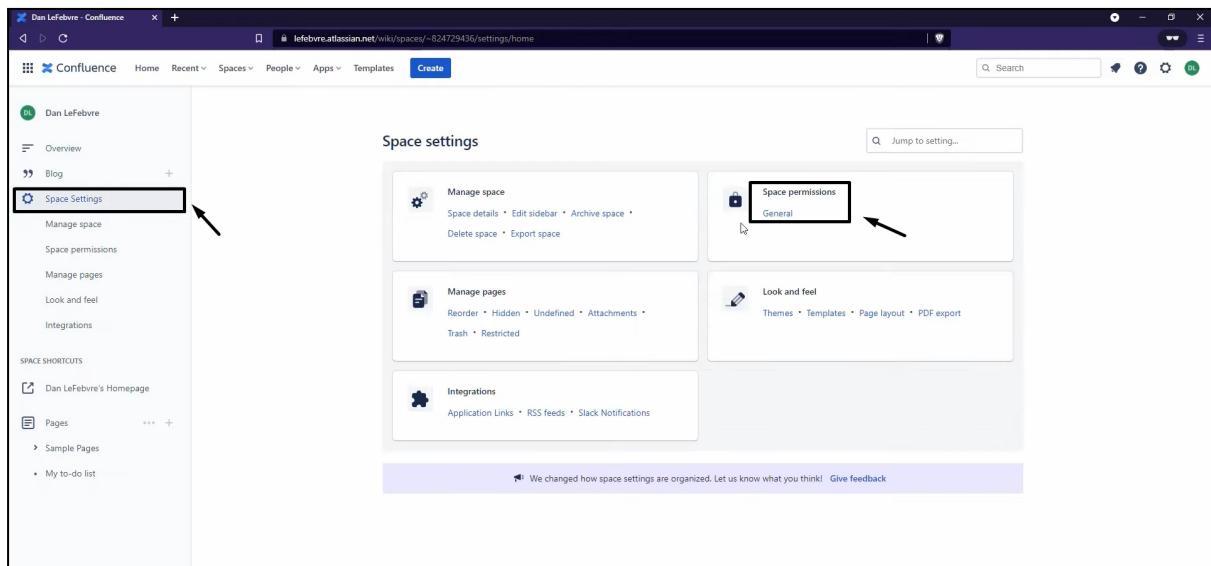
Tip: At the right of the screen you can choose a template for your Confluence page.

2. Click the **Publish** button to publish your page.

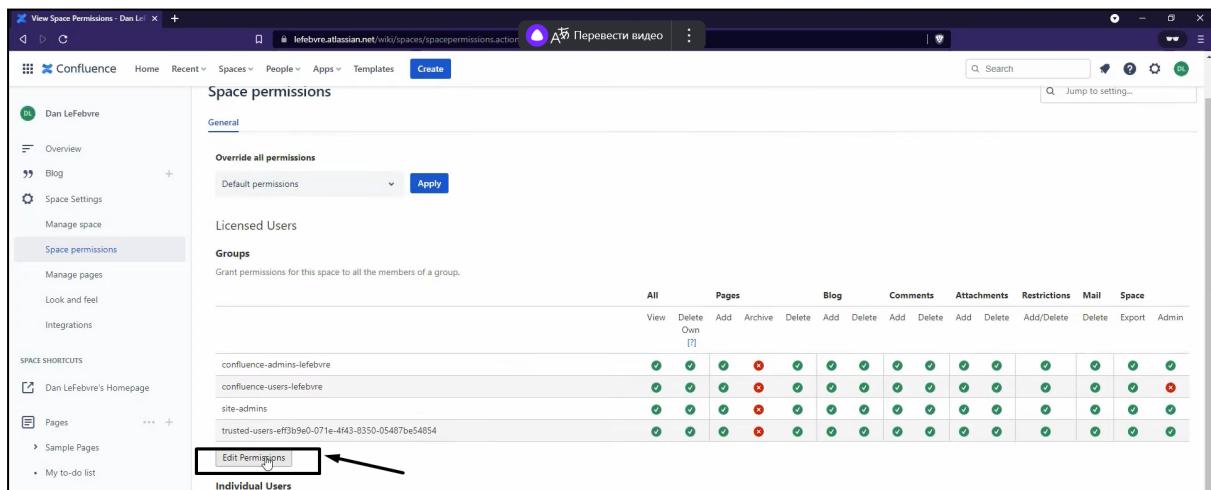
How to disable access to your personal space in Confluence

To disable access to your personal space in Confluence:

1. Click **Space Settings>Space Permissions>General**.



2. Click the **Edit Permissions** button.



3. Uncheck the checkbox from all users.

The screenshot shows the 'Edit Space Permissions' interface for the 'Dan LeFebvre' space. The 'Groups' section is active. A red box highlights the 'Select All' checkbox for the 'confluence-admins-lefebvre' group under the 'All' tab. An arrow points to the 'Save All' button at the bottom left.

4. Click **Save All** to save your changed permissions.

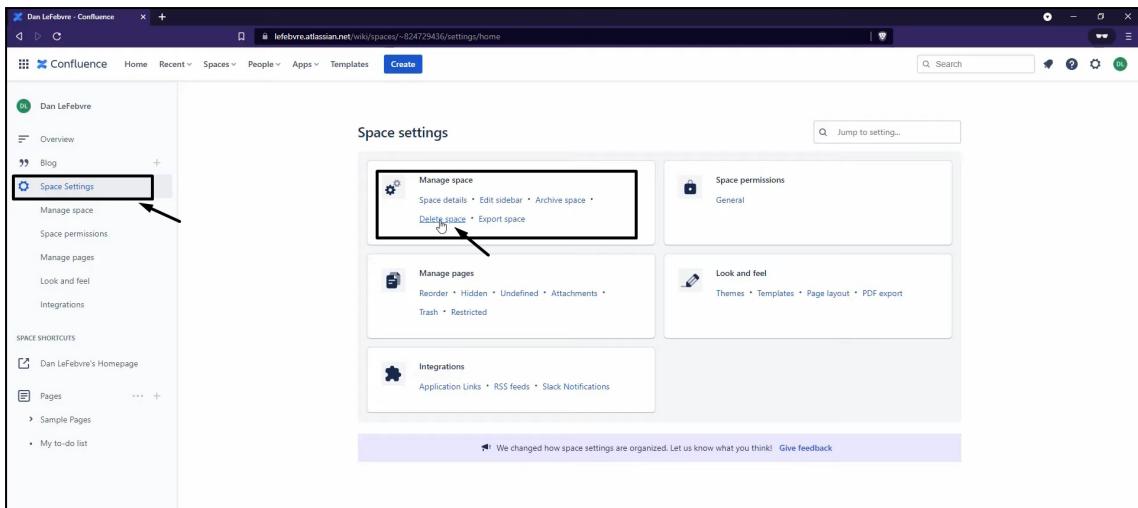
The screenshot shows the 'Edit Space Permissions' interface for the 'Dan LeFebvre' space. The 'Groups' section is active. A red box highlights the 'Select All' checkbox for the 'confluence-admins-lefebvre' group under the 'All' tab. An arrow points to the 'Save all' button at the bottom left.

The access to your page is disabled.

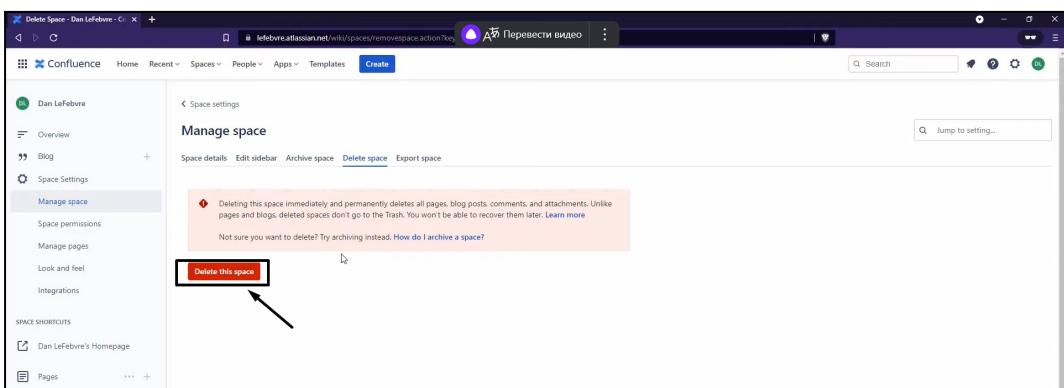
How to delete a personal space

To delete a personal space:

1. Click **Space Settings>Manage Space>Delete Space.**



2. Click the **Delete Space** button.



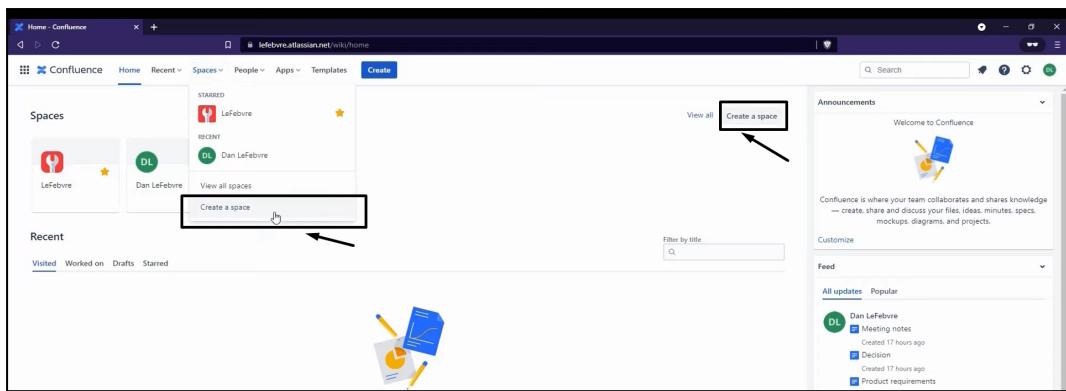
Personal space is deleted.

How to create a team space

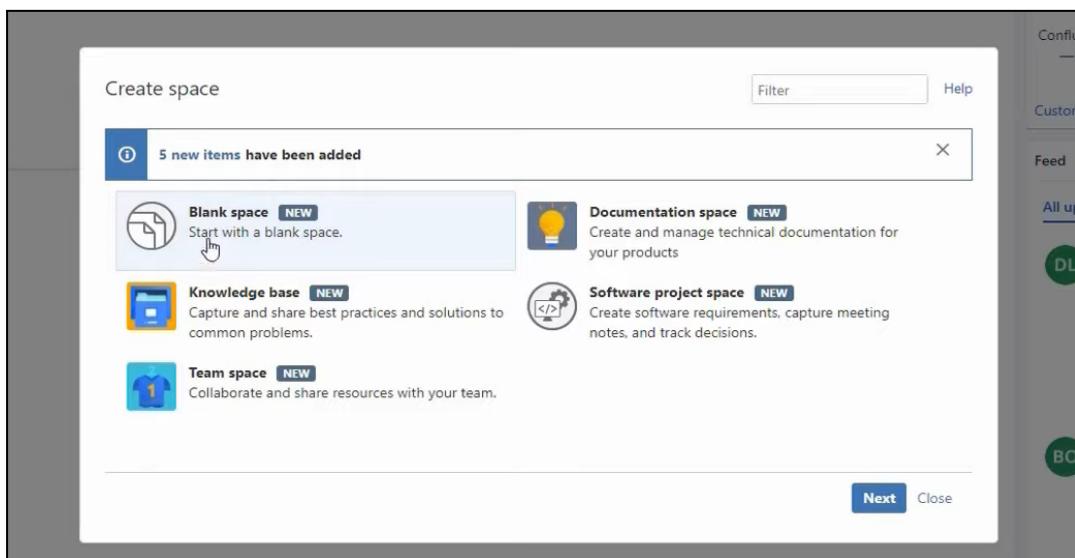
Note: Creating a team space requires Confluence admin permissions.

To create a team space:

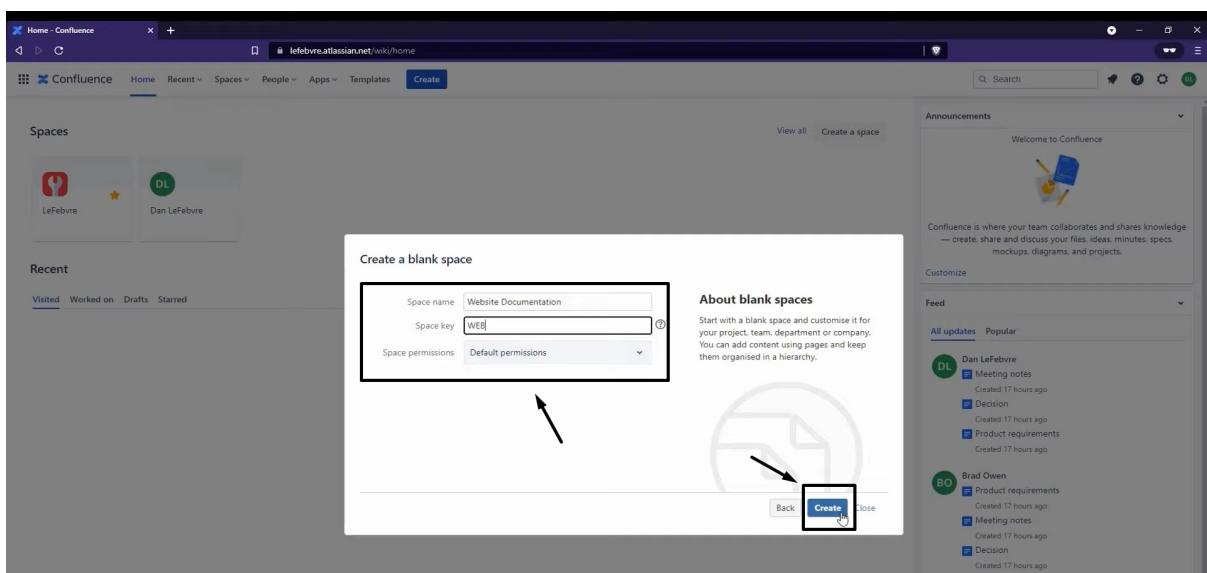
1. Click the **Create a space** on the home screen or click **Spaces** at the top of the screen and in the dropdown list select **Create a space**.



2. Select a necessary template.



3. Starting with a blank space, type in the fields your **Space name**, and **Space key**, choose **Space permissions** as **Default permissions** and click **Create**.

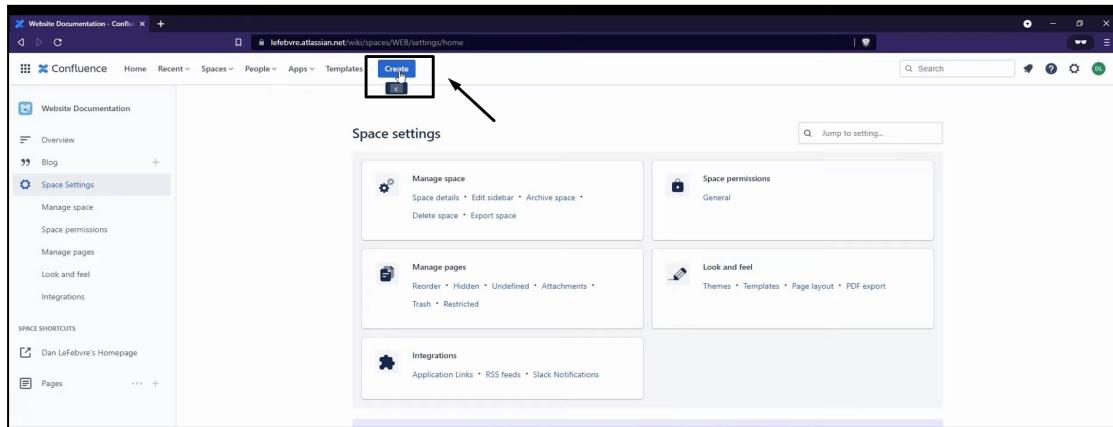


A team space is created.

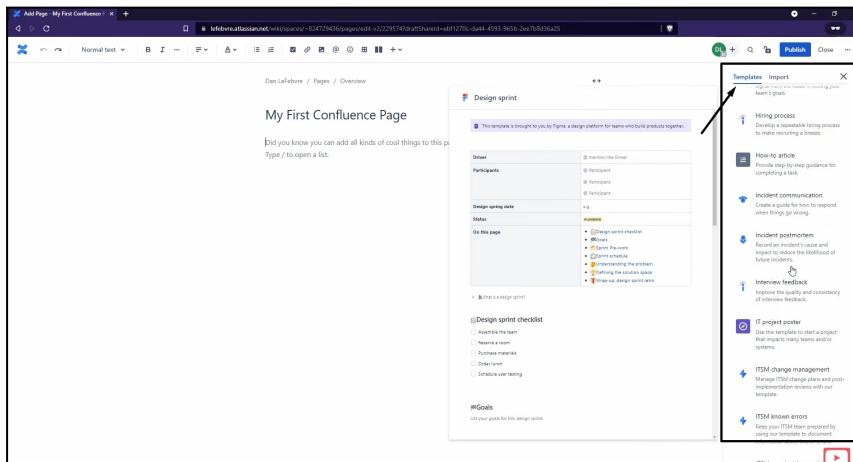
How to create a page in a team space

To create a page in a team space:

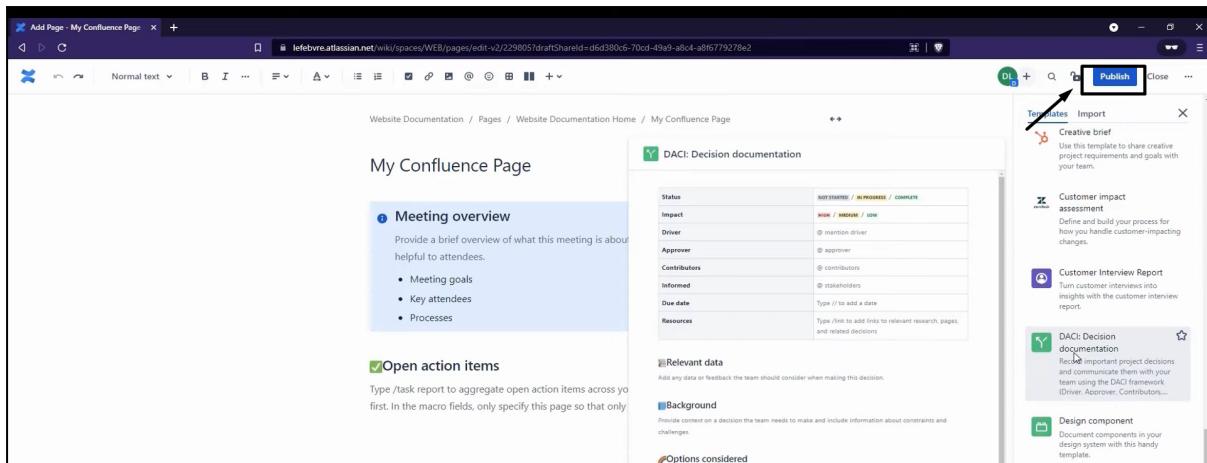
1. Click **Create** at the top of the screen.



Tip: As in personal space you can choose a template for your page.



2. Click the **Publish** button to publish your page.

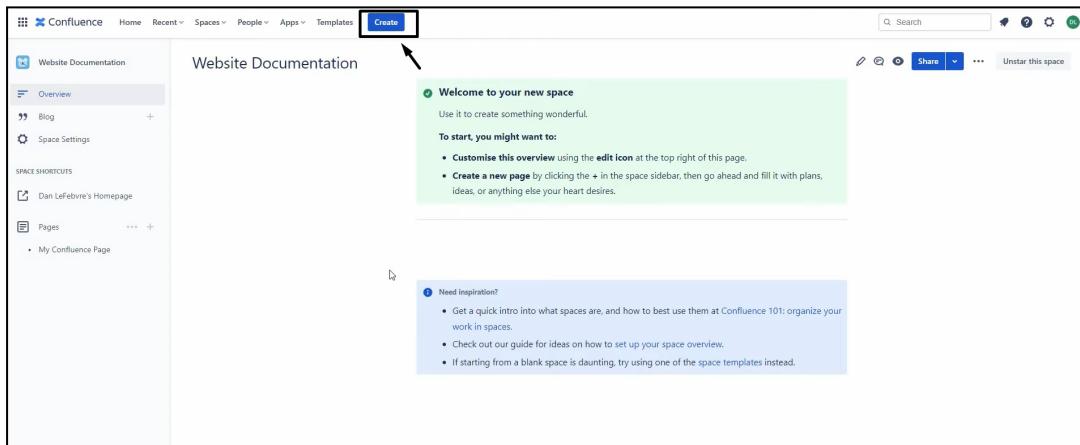


A team page is created.

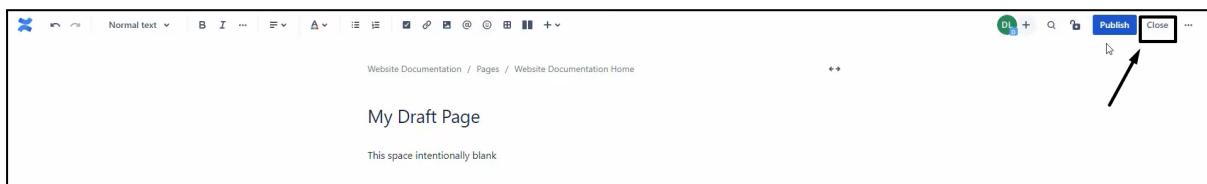
How to create a draft on a personal or a team page

To create a draft on a personal or a team page:

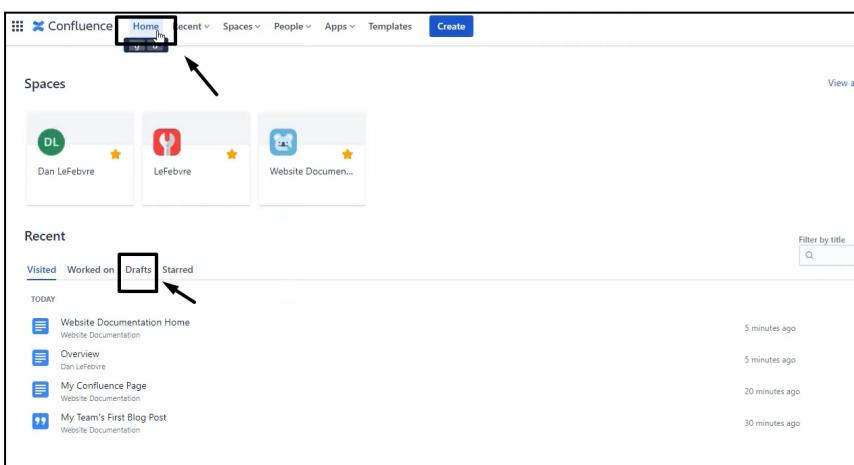
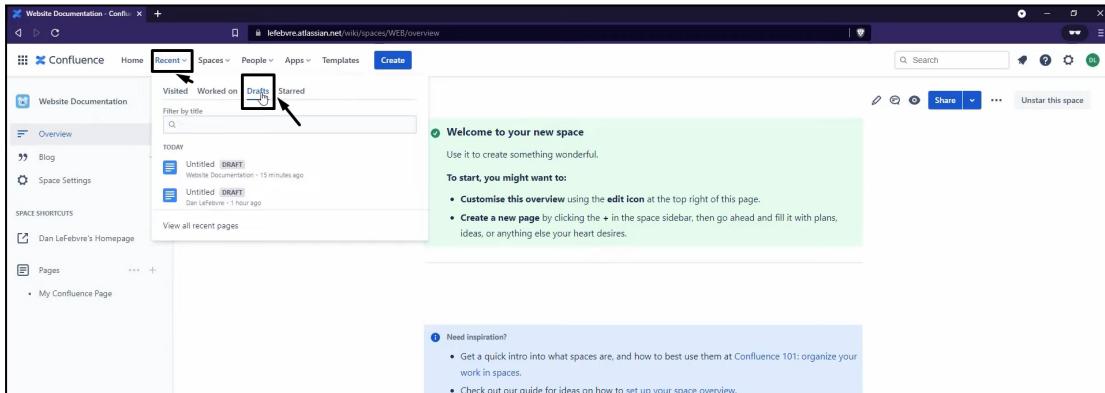
1. Click **Create** at the top of the screen.



2. Click the **Close** button.



3. Click **Recent>Drafts** to see your drafts or click the **Home** button to see **Drafts** on the home screen.



Note: Click **Publish** any time you make any changes to a published page to save it as a published version, not as a draft.

Drafts are created.

How to come back to the last published version

To come back to the last published version click the icon at the top-left corner of the screen and select **Revert to the last published version** from the dropdown list.



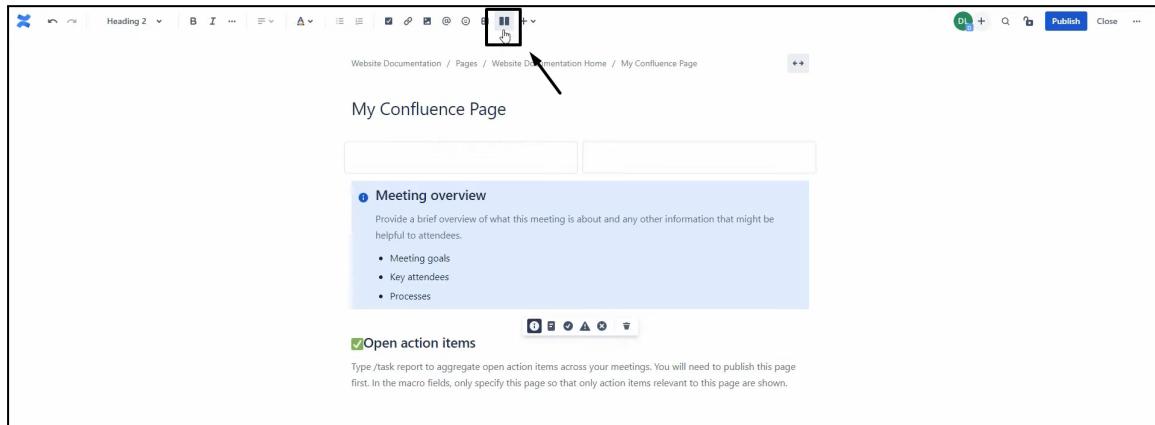
How to edit an existing page

To edit an existing page:

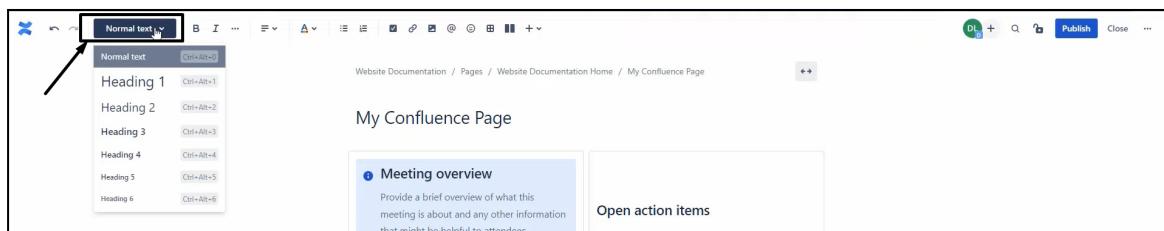
1. Click the  icon at the top-right of the screen.

2. Click the  icon at the top-right of the screen to toggle the page.

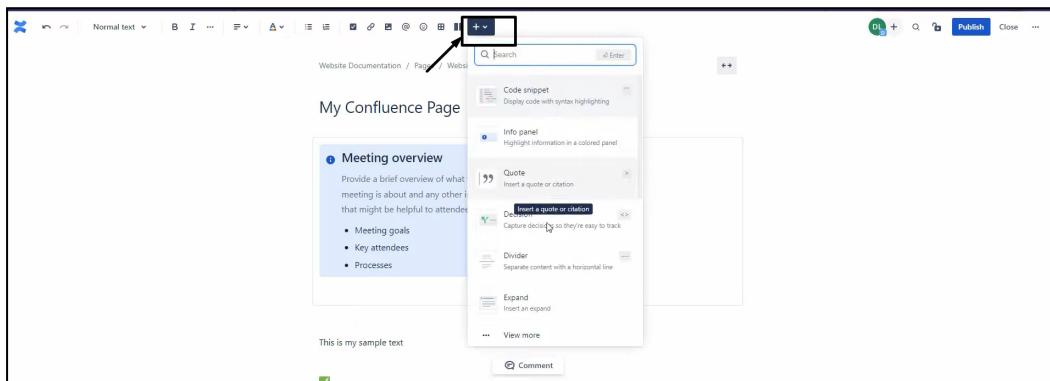
3. Click the  icon to add a new column layout on a page.



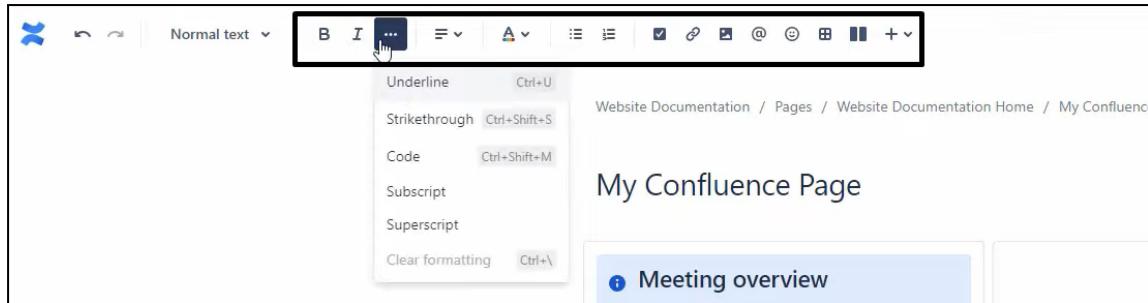
4. Click **Normal text** to change the format of your text.



5. Click the  icon to add more functions to your text (quotes, images, tables, etc.).



Some other functions such as bold, italic, text editor, links, mail, and emojis are also included in the list of page tools.

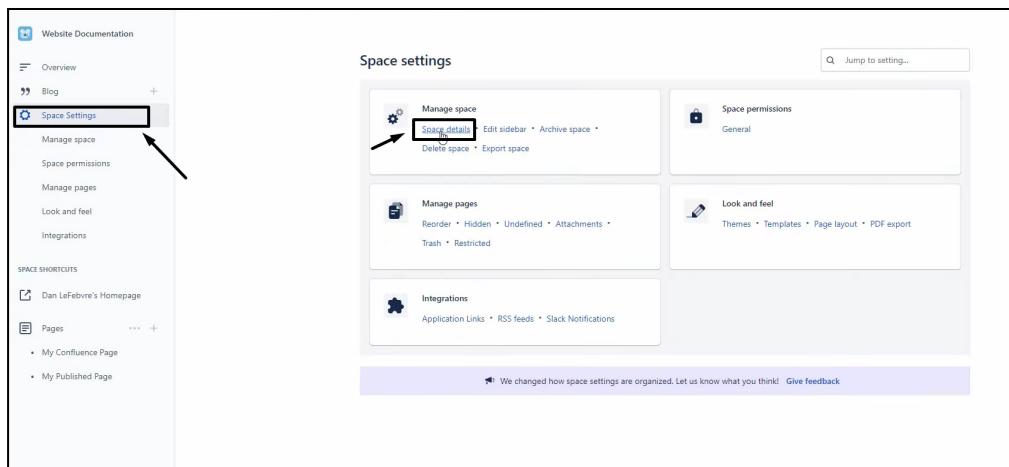


The most important editing functions have been described.

How to set a new homepage

To set a new homepage:

1. Click Space **Settings**>**Manage space**>**Space details**.



2. Click **Edit Space Details**.

The screenshot shows the 'Space details' tab selected in the top navigation bar. On the left, there's a sidebar with various settings like 'Space Settings', 'Manage space', and 'Space permissions'. The main area displays basic space information: Name (Website Documentation), Key (WEB), Home page (Website Documentation Home), Created by (Dan LeFebvre, Jan 25, 2022), Categories (None), Description (None), and Administrators (Dan LeFebvre, Chat Notifications, Dan LeFebvre). A prominent 'Edit Space Details' button is highlighted with a red box and an arrow pointing to it.

3. Type in the field on your new homepage and click **Save**.

This screenshot shows the 'Edit Space Details' dialog. It includes fields for Name (Website Documentation), Description (empty), Status (Current), and Home page (My Confluence Page). A tooltip for the 'Home page' field explains it as 'The page that displays when users navigate to this space.' The 'Save' button is highlighted with a red box and an arrow pointing to it.

A new homepage is set.

Troubleshooting

Confluence is very slow

Solution: Check the server resources that are hosting Confluence. Make sure you have enough memory, CPU power, and network bandwidth. Examine the database's setup and performance. Index tweaking, cleansing of redundant data, or increasing allocated database resources may be required.

I have problems with authorization and access to Confluence

Solution: In Confluence, review user access rights and roles. Ensure that groups and roles are properly assigned and that suitable permissions are set. Perform test scenarios and fixes to detect potential configuration or setup errors if authentication or access issues arise.

My data has been lost/unrecovered

Solution: Confluence backups should be produced regularly and saved in a secure and easily accessible location. Check that the repair techniques function properly. Set up monitoring techniques in Confluence to notify you of probable problems and failures. This enables rapid response to potential problems and prevents data loss.

I have conflicts while editing documents in groups simultaneously

Solution: To avoid disagreements, make sure users are aware of the option to lock a page before updating and that they follow agreed-upon processes. Provide collaborative editing feature training for users, emphasizing the necessity of communication and collaboration when working on shared documents.

It is difficult for me to find any information in Confluence

Solution: In Confluence, create a well-defined information architecture that includes a logical hierarchy, categorization, and consistent naming conventions. Encourage users to create and organize material following these principles.

