

Lab Exercise: Navigating Confluence with Macros

Objective: In this lab, students will learn how to enhance navigation within Confluence pages using various macros. Each exercise focuses on a specific macro, guiding you through the steps to add, configure, and understand its functionality.

Exercise 1: Utilizing the Anchor Macro for Efficient Navigation

Goal: Create anchors within a Confluence page to allow quick jumps to different sections.

1. **Preparation:**
 - Open an existing Confluence page for editing or create a new one by clicking on the "Create" button.
 - Ensure you have text that can serve as sections for anchoring. If not, create headings (e.g., "Introduction", "Conclusion").
2. **Inserting and Configuring the Anchor Macro:**
 - Place your cursor where you want the anchor to be, preferably before a heading.
 - Type "/" and start typing "Anchor"; the list will auto-filter to show the "Anchor" macro.
 - Select the "Anchor" macro.
 - In the configuration panel, set the anchor name (e.g., 'Introduction_Anchor'). Remember, no spaces in the name.
 - Click "Insert" to add the macro.
3. **Linking to the Anchor:**
 - Highlight the text elsewhere in the document you want to turn into a link.
 - Click on the link icon in the toolbar (it looks like a chain).
 - In the link settings, choose the "Advanced" option.
 - In the "Link" field, type "#" followed by your anchor name (e.g., "#Introduction_Anchor").
 - Click "Save" to create the hyperlink.
4. **Testing Your Anchor:**
 - Save the page by clicking on "Publish" or "Update".
 - Test the hyperlink you created to ensure it jumps to the correct section.

Exercise 2: Implementing the Live Search Macro

Goal: Add a live search box to your Confluence page, allowing users to search content dynamically.

1. **Preparation:**
 - Start with an existing Confluence page or create a new one.
 - Ensure the page has some content that can be searched.
2. **Inserting the Live Search Macro:**
 - While in the editing mode, type `"/` on the page to open the macro list.
 - Start typing "Live Search" until you see the "Live Search" macro.
 - Select this macro.
3. **Configuring the Live Search Macro:**
 - In the 'Restrict to this Space Key' field, enter the key of the space you want the search to focus on or use `"@self"` for the current space.
 - (Optional) In the 'Restrict to label(s)' field, specify labels to narrow down the search (if you have specific labels used in your space).
 - Choose the size of the search field, 'medium' or 'large', from the 'Size' dropdown.
 - (Optional) Enter placeholder text in the 'Placeholder text' field.
 - Set the 'Type' field to specify which content types should be included in the search.
 - Click on "Insert" to add the macro to the page.
4. **Testing Your Live Search:**
 - Publish or update the page.
 - Try using the search box by typing in a search term and observing the dynamic results displayed.

Exercise 3: Creating a Table of Contents

Goal: Implement a Table of Contents (TOC) for easy navigation within a lengthy Confluence page.

1. **Preparation:**
 - Choose a Confluence page with multiple headings (H1, H2, H3, etc.) or create a new page and add some headings.

2. **Inserting the Table of Contents Macro:**
 - In the page editor, type "/" to bring up the list of macros.
 - Start typing "Table of Contents" and select it once it appears in the list.
3. **Configuring the Table of Contents Macro:**
 - Click on the macro placeholder to highlight it.
 - Click on the 'Edit' button (pen icon) that appears on the placeholder.
 - Set the 'Outline' to 'true' or 'false' depending on whether you want numbered headings.
 - (Optional) Set the 'Style' to determine the shape of the bullets.
 - Adjust 'Max Level' and 'Min Level' to set the range of heading levels to include.
 - Exclude or include specific headings by typing their names in the respective fields.
 - Once configured, click on the page outside the macro box to close the configuration panel.
4. **Verifying Your Table of Contents:**
 - Click "Publish" or "Update" to save your changes.
 - View the published page, and you should see the Table of Contents at the location where you added the macro. Test the links to ensure they navigate correctly.

Remember, practice is key to mastering the use of these macros. Experiment with different settings and observe how they affect your Confluence pages. Each macro serves a unique purpose in enhancing the navigability and user experience of your digital workspace.

OPTIONAL / ADDITIONAL INFORMATION

Lab: Macros for Navigation on Confluence pages

Insert the anchor macro

The Anchor macro allows you to add a target to a specific part of a page so that a link can be added to jump the reader to that section. These can be especially useful for allowing your readers

to navigate to specific parts of a long document. Anchors are invisible to the reader when the page is displayed.

Use the Anchor macro

To add the Anchor macro:

1. When editing, select from the toolbar
2. Find the macro by name and select it
3. Configure it as needed

You can also type / on the page to bring up the same list you'd see by selecting from the toolbar. Continue typing the name of the macro to filter the list.

After you've inserted the anchor, you can create a link to an anchor on a page.

To edit the Anchor macro:

1. Select the macro placeholder.
2. Select the Edit icon to open the configuration panel.
3. Configure the parameters. Your changes are saved as you go.
4. Resume editing the page, and the panel closes.

You can also select the centered , medium-width , and full-width icons to adjust the width of some macros. Select the trashcan icon to remove the macro.

Wiki markup example

Wiki markup is only supported in the legacy editor.

Wiki markup is useful when you need to add a macro outside the editor, for example as custom content in the sidebar, header or footer of a space.

Macro name: anchor

Macro body: None.

```
{anchor:here}
```

Insert the Live search macro

The Live search macro allows you to add a search box to a Confluence page. When users enter a search term into the search box, Confluence will dynamically display matching results as they type.

Use the Live search macro

To add the Live search macro:

1. When editing, select from the toolbar
2. Find the macro by name and select it
3. Configure it as needed

You can also type / on the page to bring up the same list you'd see by selecting from the toolbar. Continue typing the name of the macro to filter the list.

To edit the Live search macro:

1. Select the macro placeholder.
2. Select the Edit icon to open the configuration panel.
3. Configure the parameters. Your changes are saved as you go.
4. Resume editing the page, and the panel closes.

You can also select the centered , medium-width , and full-width icons to adjust the width of some macros. Select the trashcan icon to remove the macro.

Parameters

Parameters are options that you can set to control what and how content from the macro appears on the page.

If the parameter name used in Confluence Cloud storage format or wikimarkup is different than the label used when inserting macros using the browser or the slash command, it will be listed below in brackets (example).

Parameter	Default	Description
Restrict to this Space Key (spaceKey)	all spaces	Specify a space key to limit the search to the given space. Case-sensitive. Alternatively, use @self to restrict the search to the current space.
Restrict to label(s) (labels)		Specify labels to limit the search to content with that label. If unspecified will search all content regardless of label.
Size (size)	medium	Choose a medium or large search field size.
Placeholder text (placeholder)		Specify the placeholder text to appear in the search field, for example 'Search this space'
Type (type)	all	Specify the content types to be included in the search - choose from pages, blogs, comments, space descriptions, or all content types.
Additional (additional)	space name	Display the space name, a page excerpt or nothing under the search result.

Wiki markup example

Wiki markup is only supported in the legacy editor.

Wiki markup is useful when you need to add a macro outside the editor, for example as custom content in the sidebar, header or footer of a space.

Macro name: livesearch

Macro body: None.

```
{livesearch:spaceKey=DOC|size=large|placeholder=Search this space}
```

Insert the navigation map macro

This macro was excluded from the new editor and will be deprecated from the legacy editor soon.

The Navigation Map macro displays a navigable map of the pages tagged with a given label.

Use the Navigation Map macro

To add the Navigation Map macro:

1. When editing, select from the toolbar
2. Find the macro by name and select it
3. Configure it as needed

You can also type / on the page to bring up the same list you'd see by selecting from the toolbar. Continue typing the name of the macro to filter the list.

To edit the Navigation Map macro:

1. Select the macro placeholder.
2. Select the Edit icon to open the configuration panel.
3. Configure the parameters. Your changes are saved as you go.
4. Resume editing the page, and the panel closes.

You can also select the centered , medium-width , and full-width icons to adjust the width of some macros. Select the trashcan icon to remove the macro.

Parameters

Parameters are options that you can set to control what and how content from the macro appears on the page.

If the parameter name used in Confluence Cloud storage format or wikimarkup is different than the label used when inserting macros using the browser or the slash command, it will be listed below in brackets (example).

Parameter	Default	Description
Label	none	Specify the label associated with the pages you want to show in the navigation map. This parameter is unnamed in storage format and wikimarkup.
Map Title (title)	none	Specify a title for the navigation map.
Number of Cells Per Row (wrapAfter)	5	Specify the number of cells in a row
Cell Width (Pixels) (cellWidth)	90	Specify the cell width (enter a number only, don't include px)
Cell Height (Pixels) (cellHeight)	60	Specify the cell height (enter a number only, don't include px)
Navigation Map Theme (theme)	Confluence	Define a theme for the navmap (Server only).

Wiki markup example

Wiki markup is only supported in the legacy editor.

Wiki markup is useful when you need to add a macro outside the editor, for example as custom content in the sidebar, header or footer of a space.

Macro name: navmap

Macro body: None.

```
{navmap:mylabel|wrapAfter=4|title=My map
name|cellHeight=50px|theme=navmap-mytheme.vm|cellWidth=80px}
```

Insert the page index macro

The Page Index macro creates a hyperlinked alphabetical index of all page titles within the current space.

The top section of the index contains a cell for each letter of the alphabet, with cells for numbers and symbols. Each cell indicates how many pages are in the corresponding list.

The lower section contains lists of page titles followed by the first few sentences of content on that page.

Each letter, number or symbol in the top section is hyperlinked to the corresponding cell in the lower section. Each page title in the lower section is hyperlinked to the page in the space.

The Page Index macro only works in spaces with fewer than 500 pages.

Use the Page Index macro

To add the Page Index macro:

1. When editing, select from the toolbar
2. Find the macro by name and select it
3. Configure it as needed

You can also type / on the page to bring up the same list you'd see by selecting from the toolbar. Continue typing the name of the macro to filter the list.

There aren't any parameters to enter for this macro.

Wiki markup example

Wiki markup is only supported in the legacy editor.

Wiki markup is useful when you need to add a macro outside the editor, for example as custom content in the sidebar, header or footer of a space.

Macro name: index

Macro body: None.

Parameters: None.

```
{index}
```

Insert the table of contents macro

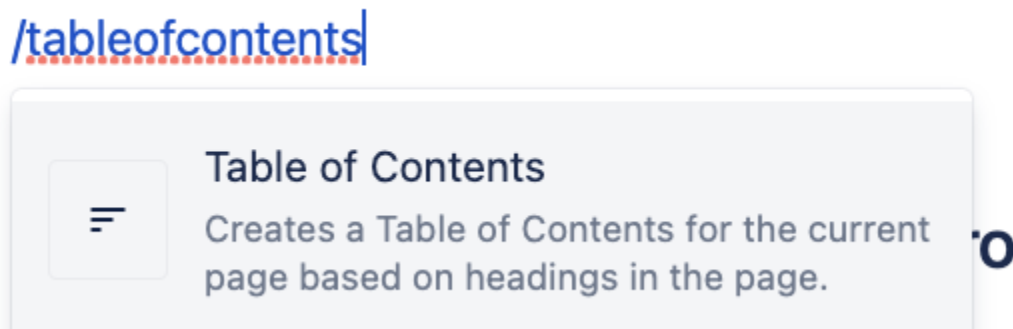
The Table of Contents macro scans the headings on the current Confluence page to create a table of contents based on those headings. This helps readers find their way around lengthy pages, by summarizing the content structure, and by providing links to headings.

Any text formatted as a heading along with emojis, mentions, statuses, and dates are available for inclusion in your table of contents.

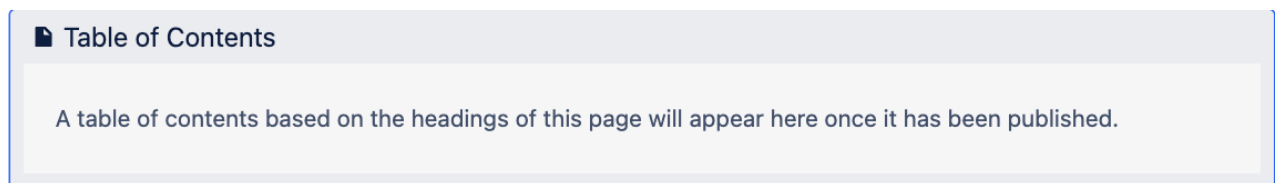
Use the Table of Contents macro

To add a Table of Contents to your page:

1. From the editor, select (icon) from the toolbar to bring up the insert menu.
2. Find the **Table of contents** macro and select it. You can also type `/tableofcontents` to select this macro from the insert menu right in the body of your page.



3. Upon selection, the **Table of Contents** placeholder will appear in the body of your page.



4. Your table of contents won't be visible while editing. When you preview the page or publish it, you'll be able to see an auto-generated table of contents based on the page's headings.

To configure your Table of Contents:

1. From the editor, select the **Table of Contents** placeholder.
2. Select the Edit (⚙) icon to open the configuration panel.
3. Customize the parameters of your table of contents in either **Basic** or **Advanced** mode.
4. Your selections won't be visible while editing. When you preview the page or publish it, you'll be able to see how your customized table of contents looks.
5. As you continue editing the page, the configuration panel will close.

You can also select the centered, medium-width, or full-width icon to adjust the width of your table of contents. Select the copy icon to duplicate it elsewhere, and/or the trashcan icon to remove it entirely.

Wiki markup example

Wiki markup is only supported in the legacy editor.

Wiki markup is useful when you need to add a macro outside the editor, for example as custom content in the sidebar, header or footer of a space.

Macro name: toc

Macro body: None.

This example shows a list-type table of contents.

```
{toc:printable=true|style=square|maxLevel=2|indent=5px|minLevel=2|class=bigpink|exclude=[1//2]|type=list|outline=true|include=.*}
```

This example shows a flat table of contents.

```
{toc:printable=true|maxLevel=2|minLevel=2|class=bigpink|exclude=[1//2]|type=flat|outline=true|separator=pipe|include=.*}
```

Notes

- When you use a Table of Contents macro in a **template**, the TOC won't render in the template itself. But the Table of Contents macro will always work on pages created from the template – after the page has been saved.
- The Table of Contents macro only displays page or blog post content.
- The Table of Contents macro only works within the page, blog, or macro to which it has been added, and cannot reference or be referenced across multiple pages or blogs. When added to an Excerpt macro, for example, it will only display headings located inside the excerpt and those heading links won't navigate to the source page.