

Intro to Confluence



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1. Course Overview



What will you learn?

- Get Tasks from Design Doc



To succeed here, you need to have

- Access to a Confluence account
- Desire to collaborate within your team

Topics

Course Overview

Getting Started with Confluence

Adding & Editing Content

Working with Attachments

Creating & Managing Pages

Topics

More Team Collaboration Features

Getting More from Pages

Using Advanced Macros

Integration with Jira

Page History & Restrictions



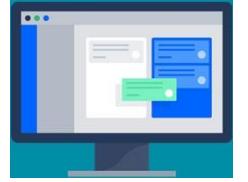
Live teach schedule

1	Course Overview	15 min
2	Getting Started with Confluence	1 hr 15 min
	Break	10 min
3	Adding & Editing Content	1 hr 5 min
4	Working with Attachments	55 min
	Lunch	30 min



Live teach schedule

5	Creating & Managing Pages	1 hr 15 min
6	More Team Collaboration Features	25 min
	Break	10 min
7	Getting More from Pages	30 min
8	Using Advanced Macros	25 min
9	Integration with Jira	35 min
10	Page History & Restrictions	20 min
	Total	7 hr 50 min



Lab 1- Starting Your Lab Environment

- Use the link provided to access your lab VM
- Start your Confluence instance

2. Getting Started with Confluence

What will you learn?



- Explore the dashboard and spaces
- Create a page using a blueprint
- Search and view content in a space
- Set up your profile

What is Confluence?

Single place online to

- Create & share rich content
- using pages, blog posts, & comments



Confluence Benefits

Collaboration platform

Create, share, and act on content:

Confluence features

Collaborative text editor, simplified workflow, collaboration features, automatic versioning, system-wide search

What else can it do?

Helps manage meetings & decision making; lets you create Knowledge Base, blogs, & company-wide Q/A; supports post-project improvement.

Confluence

Collaboration platform

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Benefits

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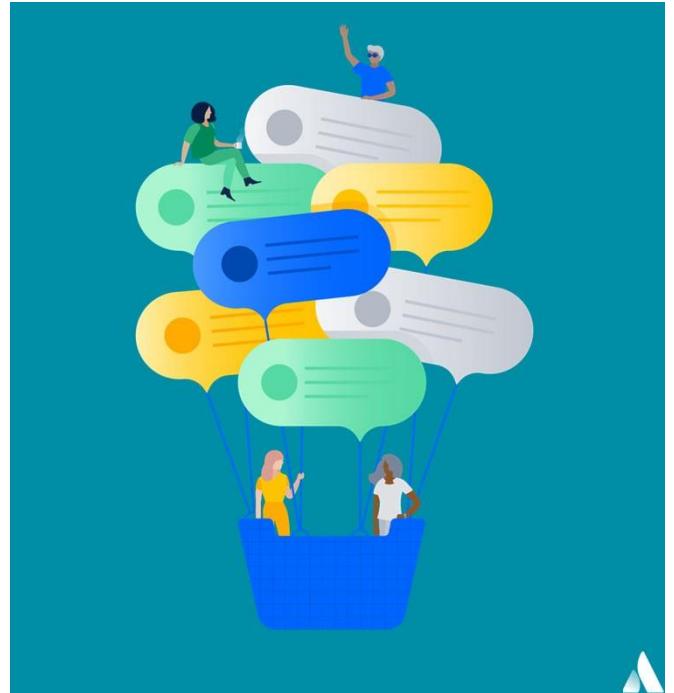
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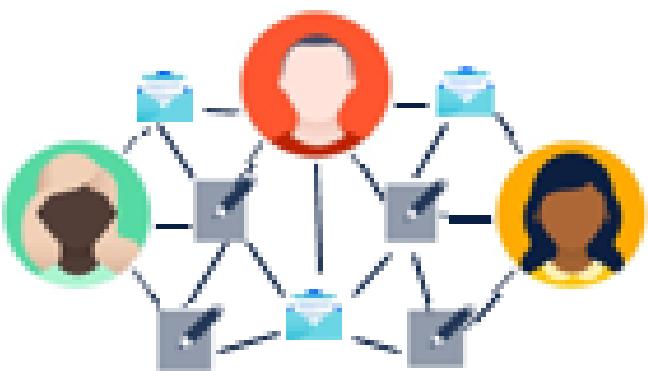
Think About It

How does your organization deal with company-wide announcements today?

- Email
- Company intranet
- Word of mouth
- We don't make company-wide announcements



WITHOUT CONFLUENCE



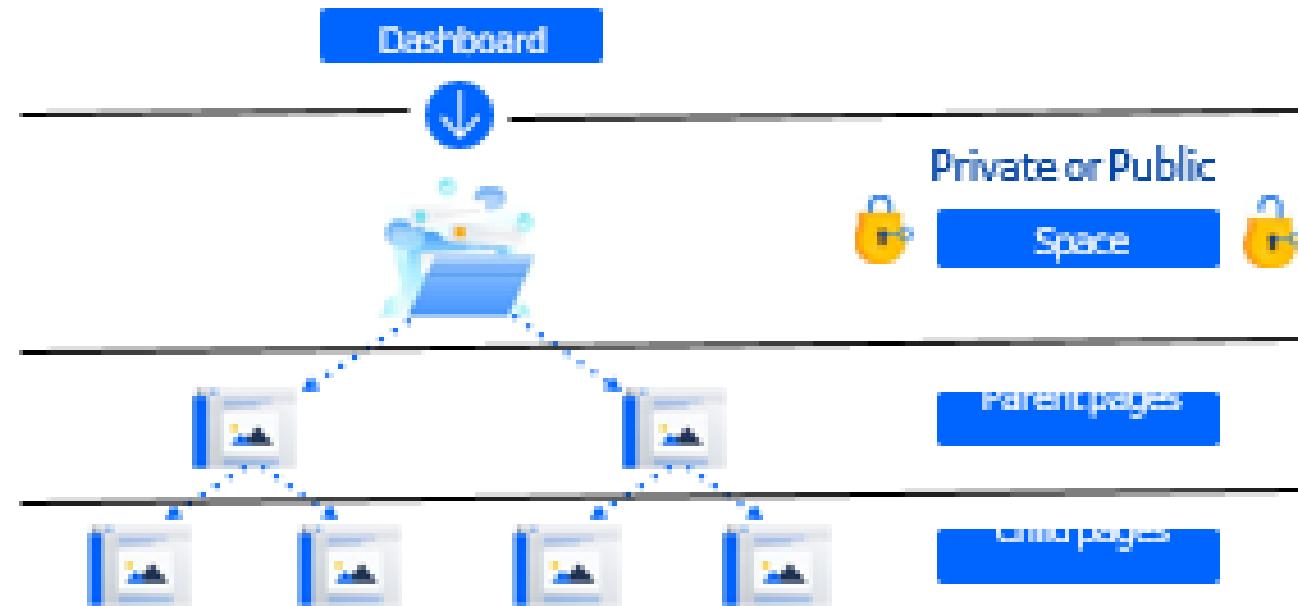
Duplication
Multiple Versions

WITH CONFLUENCE



Centralized Location
One Version

Content Hierarchy



Dashboard Elements

The screenshot shows the Confluence dashboard with several key components highlighted:

- Expandable Sidebar with more options**: A red box highlights the sidebar on the left, which contains icons for recent changes, news, people, calendar, and more. A callout line points to the "More" icon at the bottom of the sidebar.
- Expand Sidebar**: A callout line points to the "Expand Sidebar" button located at the bottom of the sidebar.
- All updates**: A red box highlights the "All updates" section, which lists recent activity from users like Terry Chapin and System Admin. A callout line points to the "Updates" link at the bottom right of this section.
- Welcome message**: A callout line points to the "Welcome to Confluence" message, which provides an overview of what Confluence is used for.
- Add team calendars**: A callout line points to the "Upcoming Events" section, which displays events for the "Backlog Grooming Team" on May 7th and "Sprint review and retrospective Team meetings" on May 8th. It also includes a link to "Add team calendars".

Sidebar



What is a Space?



A home for your team's content

Use them for teams, projects, departments.



Add external content

Documents, files, photos, blogs, videos, meeting minutes...



Organize content in a hierarchy

Make it easier to find the content you need.



Use blogs

Share news, make announcements...

Space Home Page

The screenshot shows the 'Teams in Space Home' page in Confluence. The top navigation bar includes links for Confluence, Spaces, People, Calendars, and a redboxed 'Create' button. The left sidebar has sections for 'Space name' (Teams in Space), 'Space Shortcuts' (Meeting Notes, Product Requirements, Shared Links, File Lists), and 'Pages' (Flight School Programs, Mars Travel Programs, Meeting Notes, Product Requirements, Itinerary Comparisons, TeamSpace12 - Large Team Sync, TeamSpace12 - Travel Providers). A 'Create page' button is located at the top right of the main content area. The main content area displays 'Recent space activity' and 'Space contributors'.

Space name: Teams in Space

Create page

Space Shortcuts

- Meeting Notes
- Product Requirements
- Shared Links
- File Lists

Pages

- Flight School Programs
- Mars Travel Programs
- Meeting Notes
- Product Requirements
- Itinerary Comparisons
- TeamSpace12 - Large Team Sync
- TeamSpace12 - Travel Providers

Recent space activity

Terry Chaplin
Flight School Curriculum created Apr 21, 2020

New Flight School Module
TeamSpaceTeacher updated Apr 11, 2020 - view change

New Flight School Module
TeamSpaceMegan updated Apr 01, 2020 - view change

Jupiter Adventure Travel updated Feb 10, 2020 - view change

Mars Team Travel Brochure updated Feb 10, 2020 - view change

Space contributors

- Terry Chaplin (15 days ago)
- Danielle Jones (263 days ago)
- Eason Downs (293 days ago)
- Kiana Grant (292 days ago)
- Michelle Davis (292 days ago)
- ...

Confluence Search

Quick Search

Type search string & select from options list to get search result page

Full Search

From search result page, many more options available

Filter by

Contributor, in space, of type, last modified

Search Macros

Livesearch, Page Tree Search



Search Results Page

Saturn

SEARCH RESULTS

Space

Contributor

Type

Date

Label

Space category

Advanced search

SEARCH TIPS

Summer Saturn Sizzle Blog Announcement

Teams in Space · Sep 06, 2018

earth_from_saturn_small.jpg Posted Live on the website

<http://uv01er571zsmcb8pnk-env.cloudshare.com:2431/>?page_id=601

Saturn overview

Teams in Space · Mar 01, 2019

earth_from_saturn_small.jpg

Itinerary Comparisons

Teams in Space · Mar 01, 2019

Can get crowded during high season due to the number of rovers that have been allowed to land on this planet mars.jpg

Jupiter Overview

Teams in Space · Mar 01, 2019

miles 178,800,000 km) Jupiter is categorized as a gas giant, along with Saturn, Uranus and Neptune.

Write your own filter using
Confluence Query Language (CQL)

Search for:

- Page name
- Person
- Text in a page
- Label

Why Use Personal Spaces?



Introduce yourself

Great way to let people know who you are and make friends



Stay organized

Keep notes, task lists, files, reminders, and capture ideas



Share news

Use your blog to make announcements and share learnings



Stage content

Create and edit content before going "live" in a team space

Creating a Personal Space

The screenshot shows a Confluence interface with a sidebar on the left and a main dashboard on the right.

Left Sidebar:

- Add personal space...** (highlighted with a red box)
- Recently viewed
- Recently worked on
- Profile
- Tasks
- Saved for later
- Watches
- Drafts
- Network

Main Dashboard - Alana Grant's Home:

- Dashboard** (highlighted with a red box)
- About Me (Alana Grant)**: You may edit this page to include additional information about yourself.
E-mail: agrant@marin-in-space.com
- Recently Updated**:
 - Alana Grant's Home (just a moment ago - created by Alana Grant)
 - Alana Grant (just a moment ago - created by Alana Grant)
- Write a comment...**

CREATE BLANK PAGE

Customize the page to meet
your requirements

More work!

CREATE PAGE FROM BLUEPRINT

Start with a template or blueprint

Many available out of the box

More available in Atlassian
Marketplace

Less work!

Blueprints

- Page templates with added functionality
- Create robust content easily
- Help with collaboration
- 3rd part blueprints available

Just select the blueprint you want from the Create Page window!



- How-to
- Meeting notes
- Decision
- Retrospective
- File List
- Product Requirements

Team Playbook Blueprints

- Create pages that help your team function more effectively
- Designed to help all types of teams get work done!

Team Meetings: Does This Look Familiar?

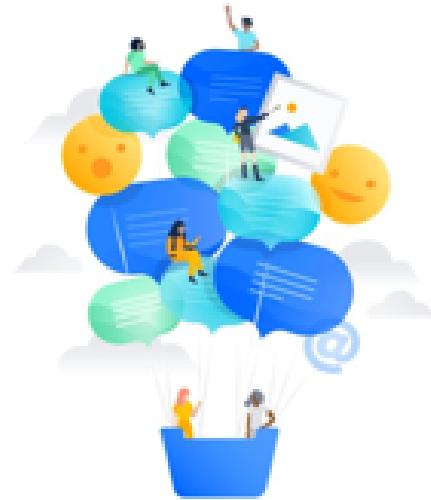


Meeting Management with Confluence

Use a Confluence [meeting notes blueprint](#) to easily:

- Schedule meetings
- Define agendas
- Record Meeting Notes
- Assign Tasks

The whole team stays in the loop!



Meeting Management with Confluence

Prior to meeting

Invite people
using @mentions

Set agenda

Teams in Space / Dashboard / Teams in Space Home SMART

2018-10-08 Meeting notes

Date
 08 Oct 2018

Attendees

- @Alana Grant
- @Emmett Paris
- @Ryan Lee
- @Jennifer Evans

Goals

- Review Q3 product priorities for the quarter

Discussion items

Time	Item	Who	Notes
10min	Engineering update	@Emmett Paris	Status update for all teams
20min	Review of important issues in the product backlog	@Ryan Lee	Update on new priorities in the backlog

Action items

- @Ryan Lee: to send email blast to customers
- @Alana Grant: to update engineering schedule

During meeting

Add meeting notes

Assign tasks

Finding All Meeting Notes

The screenshot shows a SharePoint site titled "Teams In Space". The left navigation bar includes links for "Pages", "Blog", and "SPACE SHORTCUTS" (with "Meeting Notes" highlighted). The main content area is a "Meeting Notes" list. The header of the list table includes columns for "Title", "Creator", and "Modified". Two items are listed:

Title	Creator	Modified
2018-10-10 Meeting notes	Alana Grant	a minute ago
2018-10-09 Meeting notes	System Admin	about 2 hours ...

Below the list is a comment section with a placeholder "Write a comment..." and a user icon.

There's More to Confluence than Content

Encourage valuable discussions

Bring people together

Spark collaboration

Support effective communication

Promote teamwork

Keep co-workers informed



Team Collaboration Features of Confluence

- Watch
- Share
- Mark as favorite
- Like
- Follow
- Use @Mentions
- Add comments
- Track recent activities
- Write blogs
- Create a profile

Viewing Profiles of Co-workers

The screenshot shows the Atlassian Confluence People Directory. At the top, there's a navigation bar with links for Confluence, Issues, People (which is highlighted with a red box and has an arrow pointing to it from the left), Calendars, Create, and a search bar. Below the navigation is a section titled "People Directory". On the left, there are two sections: "All People" and "People with Personal Spaces". The main area displays a grid of user profiles. Each profile includes a small photo, the person's name, and their email address. A tooltip "Follow" appears over the Cassie Owens profile. A dashed line highlights the Cassie Owens profile, which is also selected. To the right of the grid, there's a "Search" field and a "Clear" button. A blue link "Look at profile details" is positioned to the right of the grid. On the far left, there's a sidebar with the text "Follow activities on Confluence".

Name	Email
Alana Grant	agrant@team-in-space.com
Alex Dupree	adupree@team-in-space.com
Cassie Owens	cowers@team-in-space.com
Cassie Owens	cowers@team-in-space.com
Emanet Paris	eparis@team-in-space.com
Jennings	jennings@team-in-space.com
Jennifer Evans	jeneva@team-in-space.com
Kaslin Campbell	kcampbell@team-in-space.com
Mae Taylor	mtaylor@team-in-space.com
Mitch Davis	mdavis@team-in-space.com

Editing Your Own Profile

The screenshot shows a user profile page for 'Alana Grant'. At the top right is a 'Edit profile' button. On the left, there's a sidebar with a 'Change profile picture' link. The main content area has tabs for 'Profile', 'Tasks', 'Saved for later', 'Watched', 'Drafts', 'Network', and 'Settings', with 'Profile' being the active tab. Below these tabs is a 'Personal space' section with 'Home' and 'Picture' links. The central part of the page is divided into sections: 'Activity' (listing recent updates like 'Alana Grant profile updated'), 'Personal' (listing 'Full Name: Alana Grant', 'Email: agrant@isama-in-space.com', 'Phone', 'ID', and 'Website'), and 'Company' (listing 'Position', 'Department', and 'Location'). A large blue call-to-action button on the right says 'Change personal & company info'.

Profile

Alana Grant

Edit profile

Change profile picture

Personal space

Home

Picture

Activity

- Alana Grant profile updated 26 minutes ago
- Alana Grant's Home created 26 minutes ago
- Alana Grant created 26 minutes ago
- Jupiter Overview updated Jul 16, 2019 - view change
- Jupiter.jpg attached Jul 16, 2019
- Jupiter Adventure Travel updated Jul 16, 2019 - view change
- Jupiter and moons.jpg attached Jul 16, 2019
- Itinerary Comparisons updated Jul 16, 2019 - view change
- Space Oddity - International Space Station Version commented Jul 16, 2019
- Shared Links

Personal

Full Name: Alana Grant

Email: agrant@isama-in-space.com

Phone

ID

Website

Company

Position

Department

Location

Change personal & company info

Takeaways

- Content in Confluence is organized into spaces that contain pages and sub-pages (parent and child pages)
- Create a new page from a blank template or from a more richly featured blueprint
- Meeting management is more streamlined when using the features of the meeting notes blueprint
- Confluence Search allows you to easily find the content you need via the many search options available



Lab 2 - Getting Started Using Confluence

- Explore Confluence
- Create a page using a blueprint
- Set up your profile
- Optional - Create a personal space

3. Adding & Editing Content



What will you learn?

- Add a blog post and a blank page
- Edit a page and add basic formatting
- Insert, modify, and delete links on a page
- Comment on and like a page

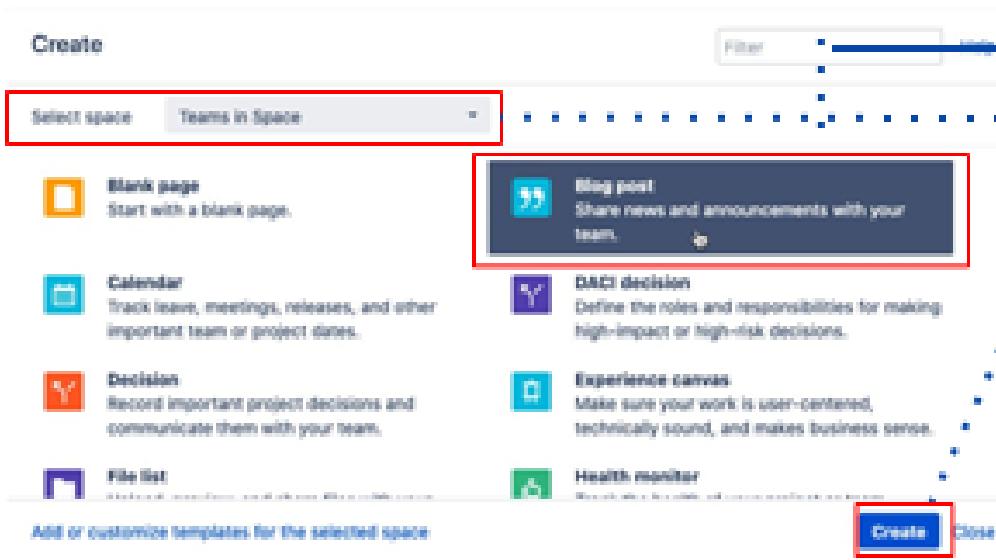
Creating & Setting Hierarchy for a New Page

Create blank page

The screenshot shows the Confluence interface with the following elements:

- Header:** Confluence logo, Confluence link, Spaces dropdown, People dropdown, Calendars dropdown, **Create** button (highlighted with a red box), and three-dot menu.
- Breadcrumbs:** Teams In Space / Dashboard / Teams In Space Home (highlighted with a red box).
- Page Title:** Mars Travel Brochure
- Page Actions:** Create page from blueprint, Change hierarchy here.
- Page Footer:** Changes saved, Publish, Close, and three-dot menu.

Using the Blog post Blueprint



1. Select Blog post
2. Select space
3. Create
4. Enter title and content
5. Publish!

Viewing Blog Posts

The screenshot shows the Microsoft Teams sidebar for a team named "Teams In Space". On the left, there's a "Back to pages" link and a "Show all blogs in this space" button. A blue arrow points from the text "Stored in time-based hierarchy" to a red box around the "BLOG" section of the sidebar. The sidebar lists "Pages", "Blog" (which is highlighted with a red border), "Calendars", "SPACE SHORTCUTS", "Meeting Notes", "Product Requirements", "Shared Links", and "File Lists". The "BLOG" section contains a "2019" folder, which has a "July" folder, and a post titled "New Trips to Jupiter Announced".

Back to pages

Show all blogs in this space

Stored in time-based hierarchy

Teams In Space

Pages

Blog

Calendars

SPACE SHORTCUTS

Meeting Notes

Product Requirements

Shared Links

File Lists

BLOG

= 2019

 ▼ July

 ▼ New Trips to Jupiter Announced

New Trips to Jupiter Announced

Mitch Davis posted on Jul 20, 2019

We just launched (sorry, pun intended) our new group tour packages for Jupiter. Please be in touch with me for details on this exciting new Teams in Space offering.

Edit · 1 Comment

Editing Tools

[Edit](#)

Visit Mars!

The red planet:

- Volcanoes
- Ice caps
- Deserts
- Valleys

Book a ticket

Mars Team Travel Brochure

Visit Mars!

The red planet has it all:

- Volcanoes
- Ice caps
- Deserts
- Valleys

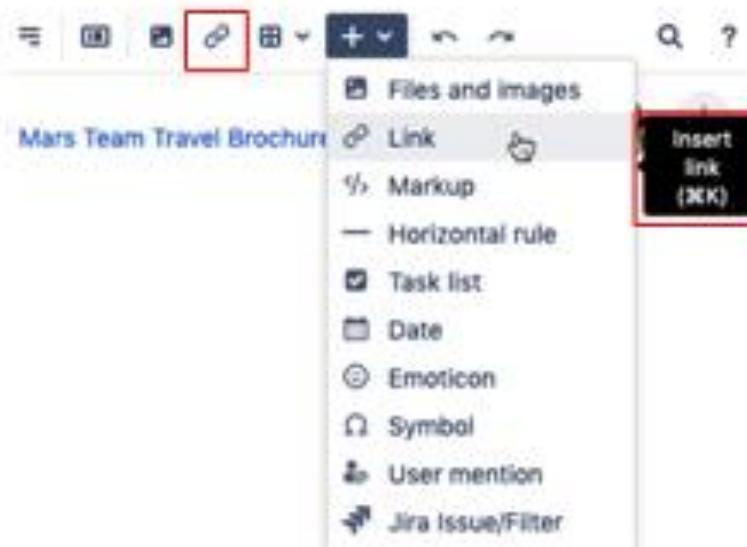
Book a one-way ticket by the end of the year and get a 20% discount!

Creating Links in a Confluence Page



Add links to:

- Confluence pages
- External web content
- Videos
- Images
- Documents



Inserting a Link to Another Confluence Page

Find the page using Search or Recently viewed

Insert link

Search
Recently viewed

Files
Web link
Advanced

Title	Space	Last Modified
Mars Team Travel Brochure	Teams in Space	Feb 11, 2020
Meet the Beespaces! Team	Teams in Space	Jan 30, 2019
Teams in Space Home	Teams in Space	Jan 22, 2019

Link text: _____

Hint: type "?" in the editor to see a list of suggested pages and insert a link.

Insert Cancel

Enter link display text

Linking to External Web Pages



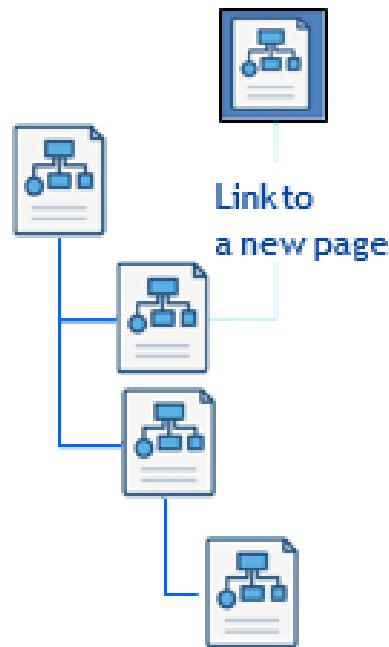
Enter URL

Enter link
display text

Inserting a Link to Create a Page

Want to link to a page you haven't created yet?

It's quick and easy!



Creating a Page While Linking

The screenshot shows a 'Insert link' dialog box with the following interface:

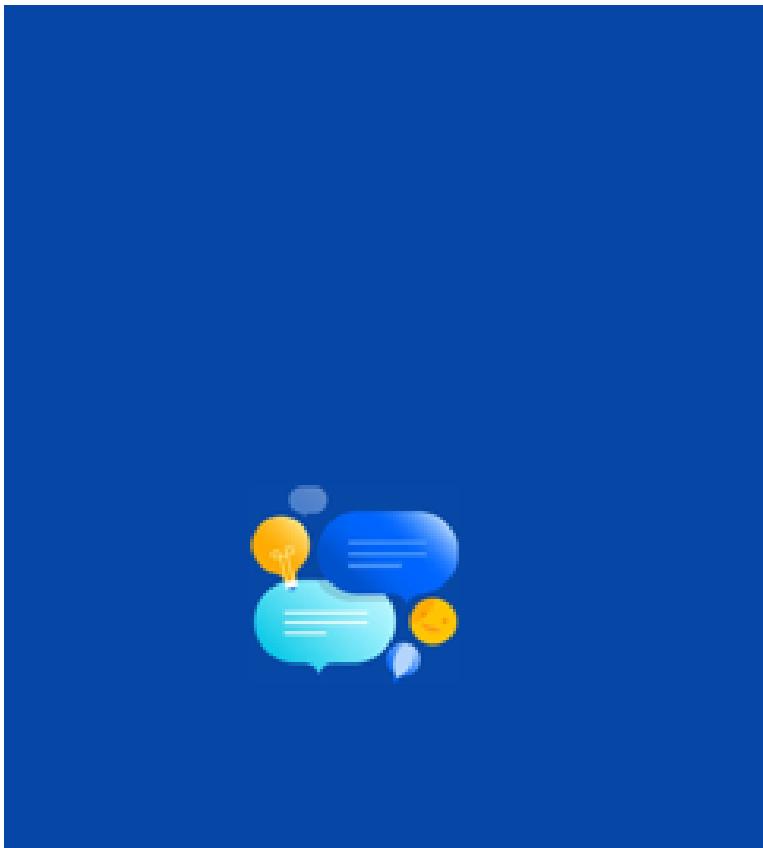
- Left sidebar:** 'Select' dropdown menu with 'Advanced' option highlighted.
- Search results:** A list of suggestions including 'Uranus Overview' (highlighted with a red box), 'Link suggestions', 'Search for 'Uranus Overview'' (with a magnifying glass icon), 'Insert web link', and '+ Insert link to create page' (highlighted with a red box).
- Main area:** A text input field labeled 'Link:' containing 'Uranus Overview'. To its right is a 'Link text' input field also containing 'Uranus Overview'. Below these fields is a note: 'Here you can insert a link into the page using wiki markup.' and 'To insert a link to a new page, type in the desired page title. To insert an anchor link, type #anchorname.'
- Buttons at the bottom:** 'Insert' and 'Cancel' buttons.

Annotations on the right side of the dialog box:

- 'Enter title of the not yet existing page...' (next to the 'Link:' field)
- 'After publishing the page, link appears in red text. Click link to create and publish the linked page.' (in a blue box over the 'Link text' field)

Annotations on the left side of the dialog box:

- '...or while typing use the [shortcut]' (next to the 'Link suggestions' section)



Like a page or a comment

Simply click the  icon. Page owner receives notification when page is liked

Page comments

A new comment thread applicable to the entire page

Inline comments

Specific to a highlighted section of content on the page

Popular Pages

Comments & likes determine popularity

Comments on a Page

Mars Overview

Created by Anna Grant, last modified 10 minutes ago

Named after the Roman god of war, Mars is often called the "red planet" due to the large quantity of iron oxide on the surface of the planet. Mars is the 4th planet from the sun, making it one of the closest to the Earth.

For more information on exciting space travel ideas at Teams in Space, check out the Mars Travel Brochure

More pictures of Mars

Like Share this post to the PPS

1 Comment

Anna Grant

Good start! I like what you've got so far but I don't want to edit your page directly. If just add some inline comments to start the conversation.

Reply Edit Delete Like Share this post to the PPS 10 minutes ago

1 of 1 X

Kevin Campbell

Open I think you meant fourth.

Replies 1 Like 0 10 minutes ago

Anna Grant

Reply

Inline comment

Both types of comments allow you to
Like, Reply, Edit, and Delete

Page
comment

53

LEARNING
VOYAGE

Adding an Inline Comment

1. Highlight the text you want to comment on
2. Select the comment icon in the popup
3. Enter your comment
4. Click Save

The screenshot shows a "Mars Overview" page with a "Add inline comment" button highlighted by a red box. Below it, a comment box from "Kevin Campbell" is shown with the text "Dope! I think you meant fourth." A "Save" button is at the bottom right of the comment box.

Mars Overview
Created by [redacted] 2 min.
Add inline comment

Named after the [redacted] - [redacted] of war, [redacted] planet. Mars is the [redacted] planet from [redacted]

war, Mars is often called the "red planet" due to the large quantity of [redacted] planet. Mars is the [redacted] planet from the sun, making it one of the [redacted]
Visitors to Mars can expect an atmosphere that will require space suits due to the lack of O₂ on the planet.
Fortunately, the diurnal cycle on Mars is similar to Earth's. Travellers should not have too much trouble adjusting their sleep cycles, other than what is usual during extended light-speed travel while in transit to the destination.

Kevin Campbell
Dope! I think you meant fourth.
Save

Inline Comments

Resolve



Remove comment
from view and
highlight from page

Review
resolved
comments

Review



Reopen

Resolved comments



20%

This should be 35% - we just got approval from the new VP, right
@Terry Chaplin ?

Reopen • replies • ✓ Resolved by Terry Chaplin just now

Close

Needs more
work? Reopen
it!

Takeaways

- In Edit mode, you have access to lots of formatting tools and you can also
 - Change the location of a page
 - Add links to internal or external pages
 - Add links to create pages
- Adding general page comments or context specific inline comments helps to open discussion around a page

Lab 3 - Adding and Editing Content

- Add a blog post and a blank page
- Edit a page and add basic formatting
- Insert, modify, and delete links
- Add comments and likes to a page



4. Working with Attachments

What will you learn?



- Add images to a page
- Attach a document to a page
- Modify an attachment and save them back to Confluence
- Use the file list blueprint

Attachments

- Files that are included with a page
- Useful when you want to share information that exists in file format
- You can attach files to any page or blog post



[Videos](#)

[Audio files](#)

[Spreadsheets](#)

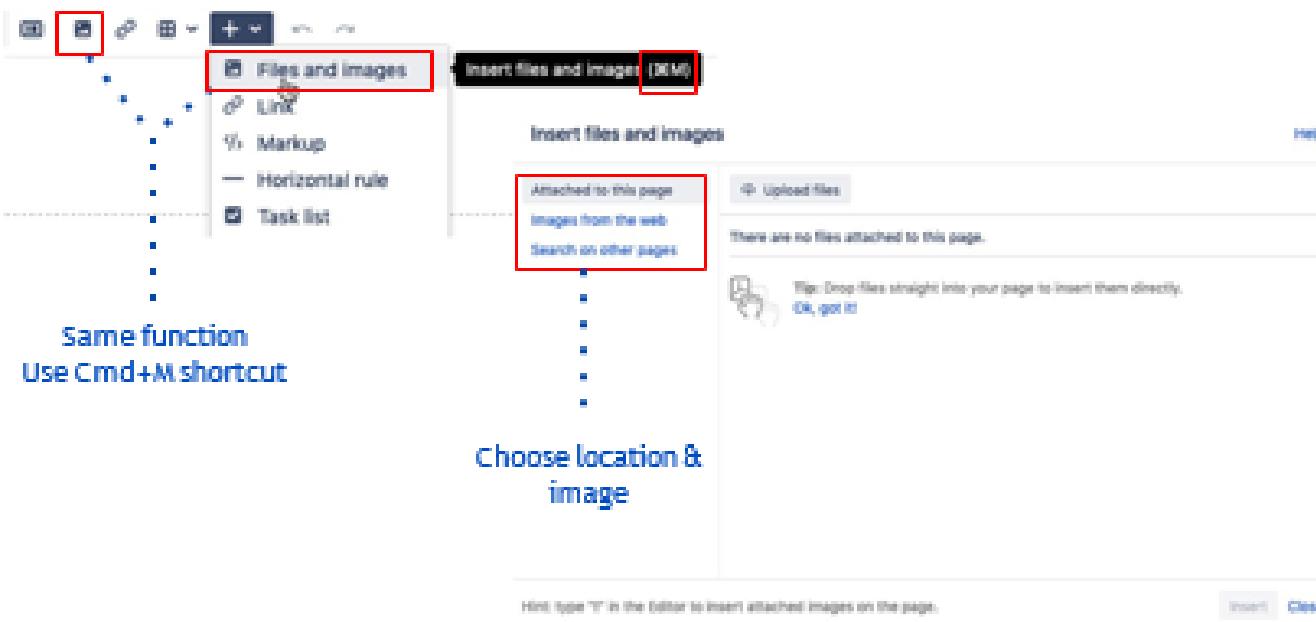
[Screenshots](#)

[Word docs](#)

[PDF docs](#)

[Images](#)

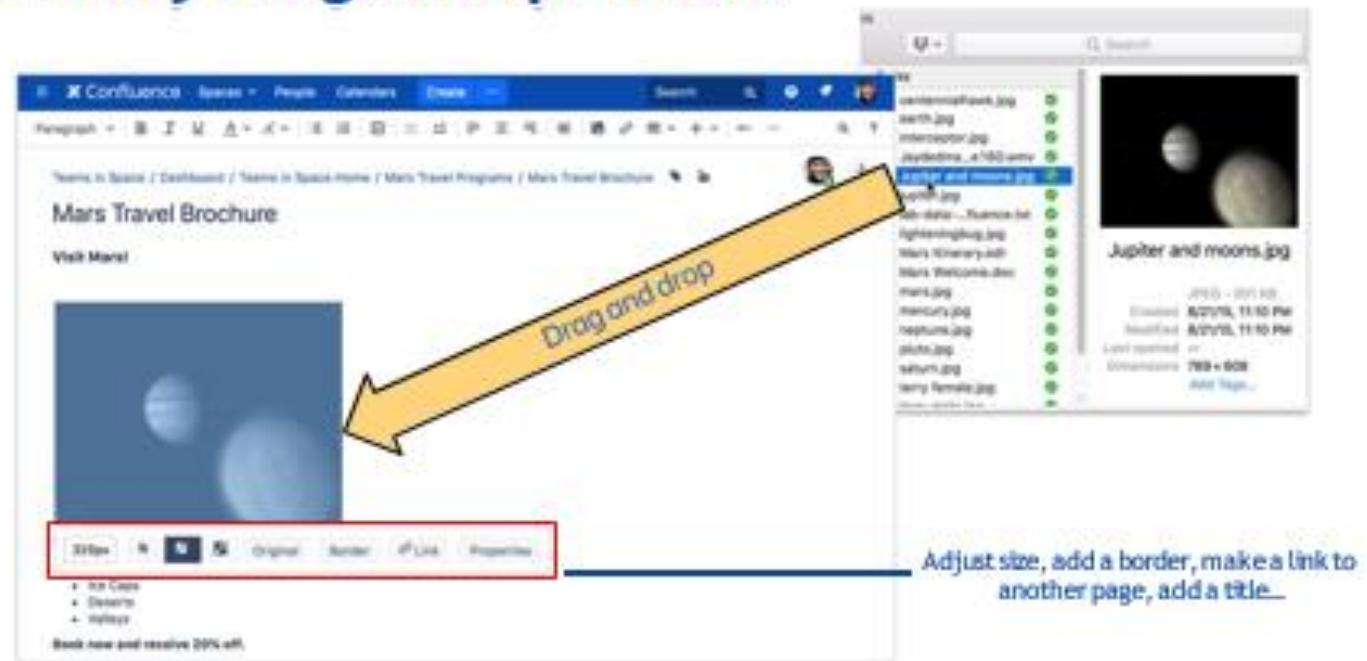
Insert from Menu



Same function
Use Cmd+M shortcut

Choose location &
image

Insert by Drag & Drop - FAST!



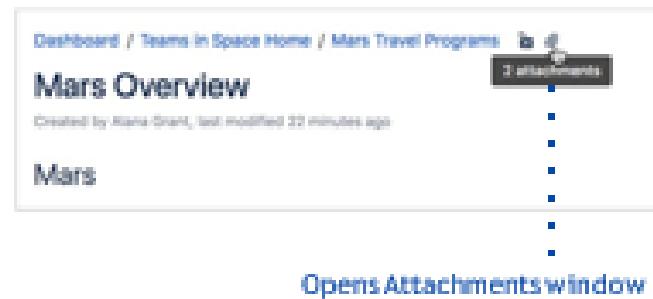
Adding Attachments to a Page

Make a document available to a page by

- Attaching it in the Attachments window
- Inserting a link to the document

Attachments window lets you add new attachments and shows:

- Any content referenced from a link on the page
- Content added from Attachment menu



Attachments on a Page

Dashboard / Teams in Space Home

Edit Save for later Watching Share ...

/ Mars Travel Programs  2 attachments

Mars Overview

Created by Anna Grant, last modified less than a minute ago

Mars

Named after the Roman god of war, Mars is often called the "red planet" due to the large quantity of iron oxide on the surface of the planet. Mars is the fourth planet from the sun, making it one of the closest to the Earth.



Visitors to Mars can expect an atmosphere that will require space suits due to the lack of oxygen on the planet.

Fortunately, the diurnal cycle on Mars is similar to earth's. Travellers should not have too much trouble adjusting their sleep cycles, other than what is usual during extended light-speed travel while in transit to the destination.

Welcome to Mars

Listed in
Attachments
Page

Using the Attachments Window

Dashboard / ... / Main Overview

Attachments

View Page Save for later

Name	Size	Creator	Creation Date	Labels	Command
Instructor Info.docx	13.48 KB	Alana Grant	Dec 11, 2019 08:15	No labels	View Properties Edit Delete
Mars.jpg	387 KB	Alana Grant	Mar 08, 2019 14:21	No labels	Properties Edit Delete

[Download All](#)

Attach Files

Attach a file Edit attachment Delete attachment

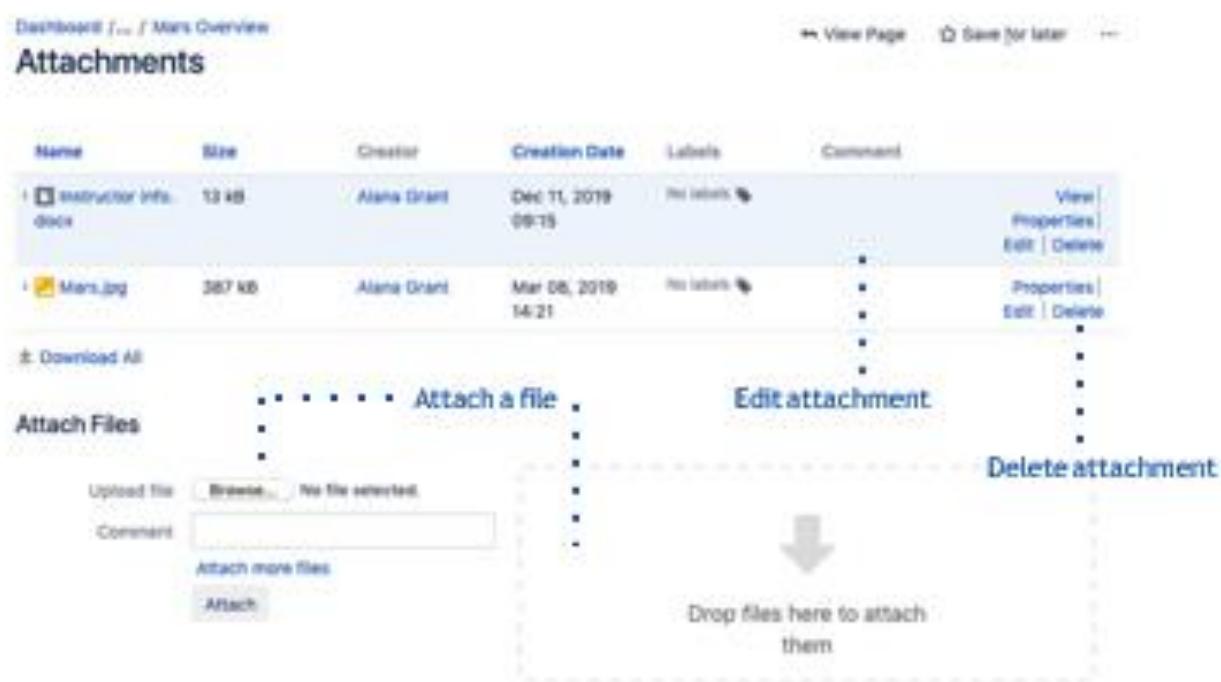
Upload file: No file selected

Comment:

Attach more files

Attach

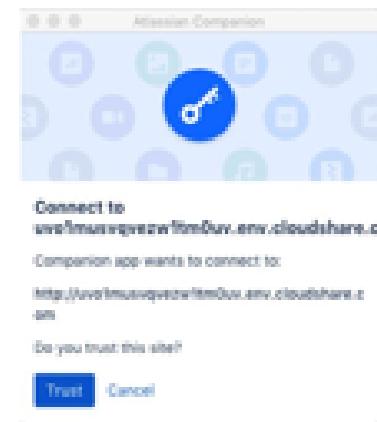
Drop files here to attach them



Editing Attachments within Confluence

- Install the Atlassian Companion
- Edit any document attached to a page using desktop application

Name	Size	Creator	Creation Date	Labels	Comment	
Instructor Info.docx	13 kB	Aleena Grant	Mar 11, 2019 09:19	No labels		View Properties Edit Delete
Meeting Log	387 kB	Aleena Grant	Mar 08, 2019 14:21	No labels		Edit with Word Properties Edit Delete



Confluence Versions the Files

- Files with same name are labeled as version of the previous
- Confluence keeps all versions
- You can delete if desired

Dashboard / ... / Mars Overview

Attachments

This version will be displayed to user

Name	Size	Creator	Creation Date	Labels
Mars.Welcome.txt	22 kB	Alana Grant	Oct 15, 2018 17:21	No labels
Version 2 (document)	22 kB	Alana Grant	Oct 15, 2018 17:21	
Version 1	10 kB	Alana Grant	Oct 15, 2018 14:55	
Mars.jpg	387 kB	Alana Grant	Mar 28, 2018 14:21	No labels

[Download All](#)

Create File Lists

Use the File List blueprint to create lists of files to share with your team

Create file list

Name	Images of Planets
Description	Helpful for marketing efforts
Restrictions	Restrict to users

About file list:
Use a file list to upload and share files with your team. Keep your project files in one, searchable location.

Back **Create** Close

FileList Blueprint

Dashboard / ... Edit Save for later Watching Share ...

/ Mars Overview

Images of Planets

Created by Alana Grant 2 minutes ago

Helpful for marketing efforts

File	Modified
centennialhawk.jpg	a minute ago by Alana Grant
earth.jpg	a minute ago by Alana Grant
jupiter.jpg	just a moment ago by Alana Grant

Drag and drop to upload or [browse for files](#)

[Download All](#)

Like Be the first to like this

[file-list](#)



Takeaways

- When you add an attachment to a page, they can be viewed and managed by clicking the attachment link at the top of the page
- Open and edit attachments in the associated desktop application and save it as a new version of the original attachment
- Posting a file list in a space can make helpful files quickly accessible to team members

Lab 4 - Working with Attachments



- Adding images to a page
- Adding documents to a page
- Modifying attachments and saving them back to Confluence
- Using a file list blueprint

5. Creating & Managing Pages

What will you learn?

- Use page layouts
- Create tables
- Use macros to valorize page content
- Reorder pages within a space
- Copy, delete, and move pages
- Fix orphaned and undefined pages



USING PAGE LAYOUTS

- Create complex pages easily
- Structure a page with horizontal & vertical sections
- Add/remove/reorder sections from contextual toolbar



Using Page Layouts

The screenshot shows the Confluence page editor interface. At the top, there's a toolbar with various editing icons. Below the toolbar, a red box highlights a section of the interface containing buttons for 'Add section' (+), 'Remove section' (-), 'Move up' (↑), 'Move down' (↓), and a set of numbered list icons (I, II, III, IV). The main workspace is titled 'Page title'. To the right, 'Layout Options' are displayed, showing a preview of the page with three columns: 'One blank column' and 'Three blank columns'. The bottom of the screen shows the URL 'Teams in Space / Dashboard / Teams in Space Home' and a status indicator 'DRAFT'.

Example Page With Layouts

How many sections do you see here?

How many columns are in each section?

Dashboard / Teams in Space Horizons

Itinerary Comparisons

Created by Cassie Dennis, last modified by Alina Ghani just a moment ago.

Each planet offers different locations and accommodations. Depending on the type and size of the group that is traveling you may want to consider these issues:

Venus	Mars	Saturn
<ul style="list-style-type: none">A good choice for short trips. It is close to earth at only 26 million miles (42 million kilometers)Very hot due to its close proximity to the sunSince it is the "planet of love", it may not be appropriate for all corporate travel needs	<ul style="list-style-type: none">A good choice for flexible travellers, as the distance between Mars and Earth can vary significantly due to their differences in orbitsThe beautiful red landscape will appeal to outdoor-oriented groupsCan get crowded during high season due to the number of rovers that have been allowed to land on this planet	<ul style="list-style-type: none">Good for the adventurous teams who are willing to put up with some level of discomfort in the wilderness of this gas giantRings and moons are beautiful and mysteriousTravellers must be able to adjust to a short day length of only 10 hours.

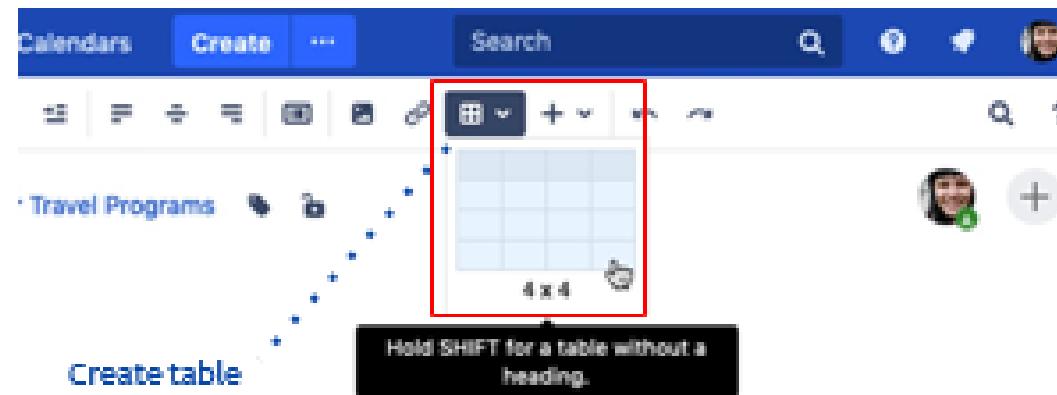
Want to learn more about these planets? Visit NASA's solar system page.

Like Be the first to like this.

Save for later

Creating Tables

- Multi-row/multi-column content
- Highlight cells, columns & rows
- Sortable column headers



Editing Tables

The screenshot shows the Confluence rich text editor interface. At the top, there's a navigation bar with links for Confluence, Spaces, People, Questions, Calendars, Create, and Search. Below the navigation bar is the toolbar, which includes icons for Paragraph (B, I, U), Bold (B), Italic (I), Underline (U), Alignment (A), Font (A), Paragraph style (P), and other editing tools. A red box highlights the responsive grid icon (grid with arrows) in the toolbar. The main content area displays a breadcrumb trail: Teams in Space / Dashboard / Teams In Space Home / Jupiter Travel Programs. Below the breadcrumb is the title "Jupiter Travel Programs". To the right of the title is a "Table Options" button. A table is displayed with four columns: Group Size, Max. Speed, and Picture. The table has three rows: Centennial Hawk, Interceptor, and Lightning Bug. The "Centennial Hawk" row is currently selected.

	Group Size	Max. Speed	Picture
Centennial Hawk			
Interceptor			
Lightning Bug			

Think About It

- What combinations of features can you envision on a Confluence page?



Macros

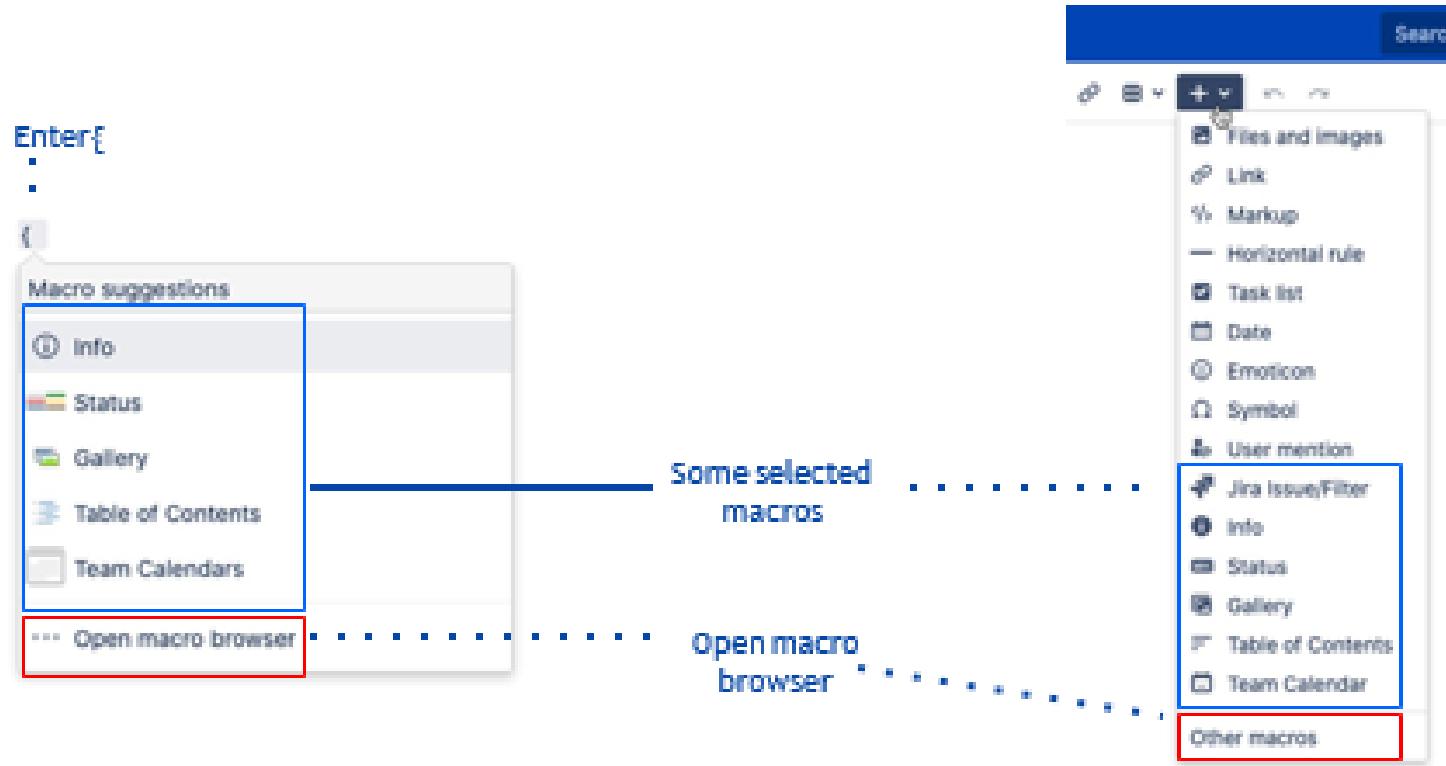
- Provide extra functionality to a page
- Allows you to include dynamic content
- Many macros shipped with Confluence
- More macros available on Marketplace

Just select a macro and configure it to meet your needs



- Status
- Roadmap Planner
- Tip
- Info
- Note
- Warning
- Expand
- TOC
- Children Display
- Advanced Roadmaps

Adding Macros to Pages



Macro Browser

Search for macros

Select macro

Categories

All

- Administration
- Communication
- Confluence content
- Development
- External content
- Formatting
- Media
- Navigation
- Reporting
- Visuals & Images

Anchor

Creates an anchor inside the page, which can be hyperlinked.

Attachments

Creates a list of attachments belonging to this page.

Blog Posts

View, summarize or list the most recent blog posts in the space.

Change History

Shows the history of recent comments for the current page or blog posts.

Chart

Display a chart.

Cheese

Inserts the text "I like cheese!", used for testing macro functionality.

Children Display

List all the children of a page (and possibly their children).

Code Block

Macro to format blocks of source-code or XML.

Atlassian Marketplace

Find more macros...

Cancel

Status Macro

Communicate the status of project, task, or milestone

Spaceships Approved for Travel by Teams in Space

Created by Alana Grant, last modified just a moment ago

Name	Group Size	Travel to Mars	Travel to Saturn	Picture	Available for Flight in Q2
Centennial Hawk	5	Yes	No	Centennial Hawk image	UNKNOWN
Interceptor	10	Yes	Yes	Interceptor image	LIMITED
Lightening Bug	50	No	Yes	Lightening Bug image	YES

⋮

Color-coded status
macro inserted 3 times

Status Macro Options

Preview

Edit 'Status' Macro

Communicate the status of a project, task or milestone with visual indicators.

Title: Approved

Color: Green

Use outline style

Define a color/title combo for each field in which you want a status to appear

Select macro

Preview

APPROVED

Outline Style

APPROVED

APPROVED

Edit APPROVED Remove

Status Change

Save Cancel

The screenshot displays the 'Status Macro Options' interface. On the left, there's a configuration panel for the 'Status' macro, including fields for Title (set to 'Approved'), Color (set to 'Green'), and a checkbox for 'Use outline style'. Below this is a note: 'Define a color/title combo for each field in which you want a status to appear'. At the bottom of this panel are 'Select macro' and 'Save/Cancel' buttons. To the right, there are three main sections: 'Preview' showing a preview of the macro with the word 'APPROVED' in a green box; 'Outline Style' showing a similar preview with a thin blue border around the text; and 'Status Change' which shows a dropdown menu with 'APPROVED' selected, along with other color options (red, yellow, green, blue) and a 'Remove' button. There are also three vertical ellipsis dots on the right side of the interface.

Roadmap Planner Macro



Roadmap Planner Macro Options

Define date range

Add lanes, bars and marker

View by Months 2015-06-01 - 2015-12-31

+ Add lane + Add bar + Add marker

Edit a lane

Product

Crowdfunding campaign

Link page > Create page

Add a description to your bars here.

Delete bar

Edit a bar

Yearly Finalisation

Edit a marker

Tip, Info, Note and Warning

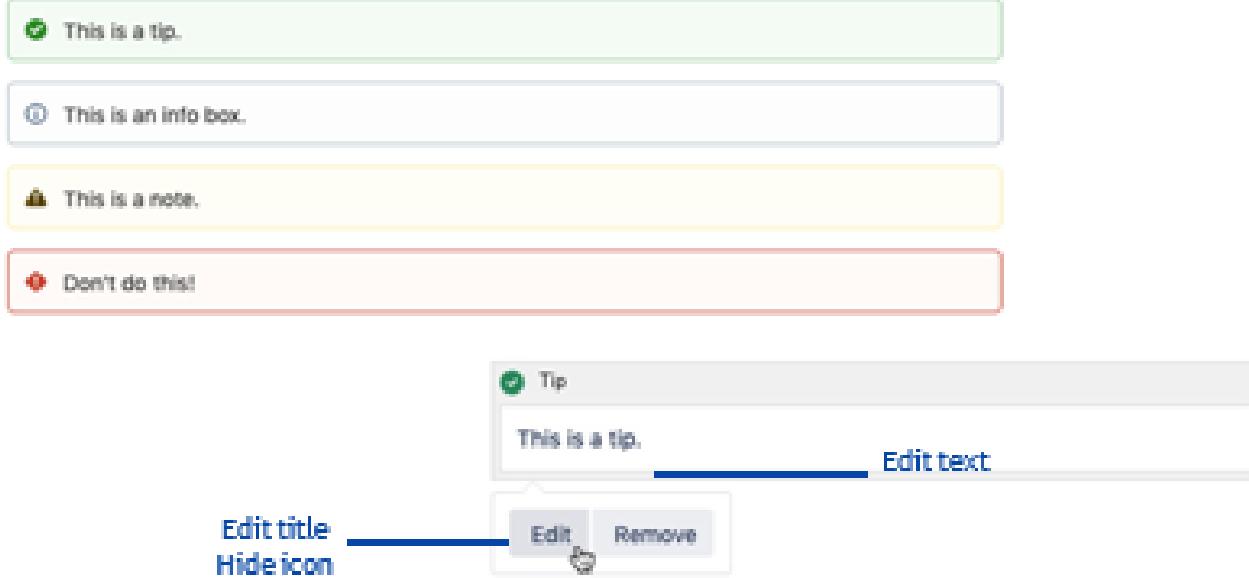
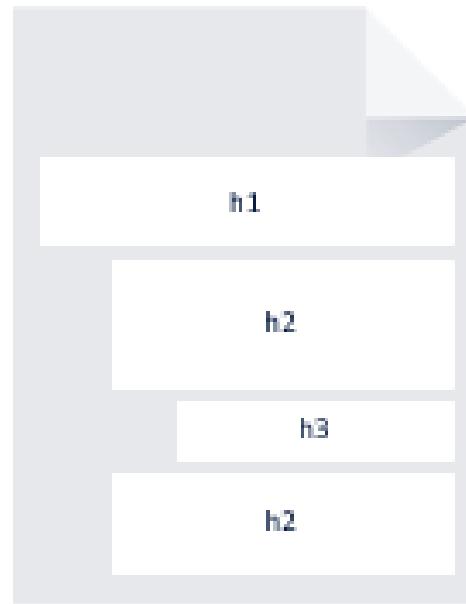


Table of Contents (TOC) Macro

- Create a TOC based on defined headings
- Provides a summary of content
- TOC items are links within the page
- Great for long documents - no scrolling
- Must have heading assignments in page for TOC to work

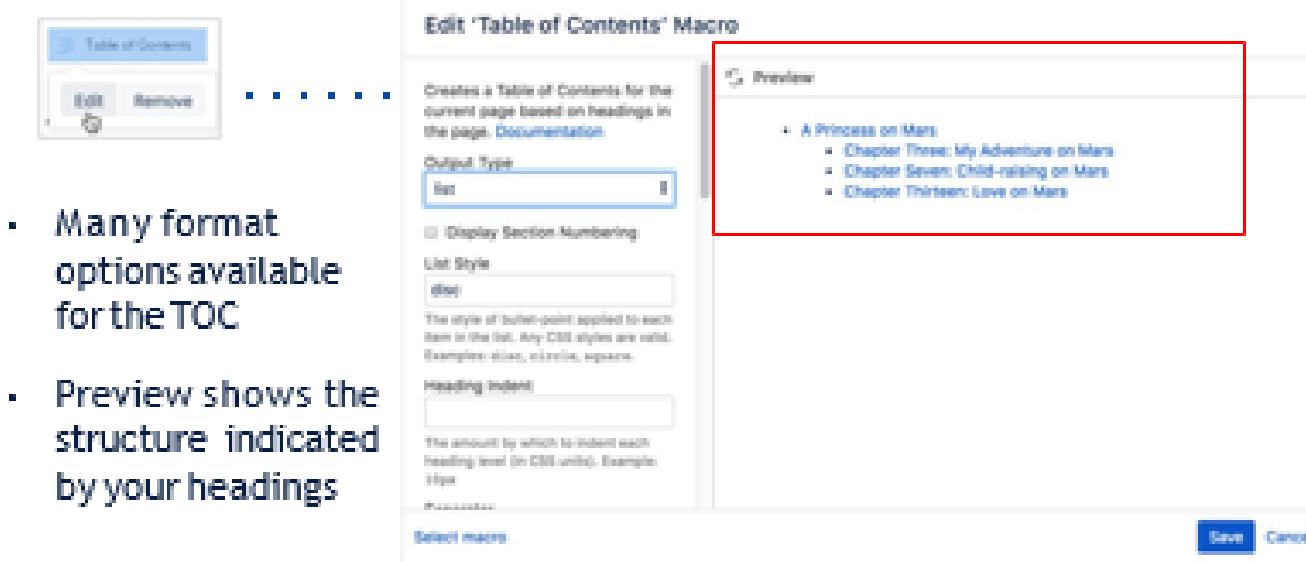


Setting Headings

The screenshot shows a web-based editor interface. At the top, there is a toolbar with various icons for text styling and document management. Below the toolbar, the page title is "Travel Inspiration: A Princess on Mars". A red box highlights the "Heading 1" button in the toolbar. In the main content area, there is a section titled "A Princess on Mars" which includes a heading "Chapter Three: My Adventure on Mars". To the left of this heading, a red box highlights the "Table of Contents" button. To the right of the heading, the text begins: "I opened my eyes upon a strange and weird landscape; I knew that I was on Mars; not once did I question either my sanity or my wakefulness. I was not alone; no need for pinching here; my inner consciousness told me as plainly that I was upon Mars as your conscious mind tells you that you are upon Earth. You do not question the fact; neither did I. I found myself lying prone upon a bed of yellowish, mosslike vegetation which stretched around me in all directions for interminable miles. I seemed to be lying in a deep, circular basin, along the outer verge of which I could distinguish the irregularities of low hills." A blue box highlights the text "TOC macro added to page in edit mode".

Heading 2

Editing the TOC



The screenshot shows the 'Edit 'Table of Contents' Macro' dialog box. On the left, there's a sidebar with a 'Table of Contents' icon, an 'Edit' button, and a 'Remove' button. The main area has a heading 'Creates a Table of Contents for the current page based on headings in the page. Documentation'. Below it, 'Output Type' is set to 'List'. Under 'List Style', there's a dropdown menu currently showing 'disc'. A note says: 'The type of bullet-point applied to each item in the list. Any CSS styles are valid. Examples: disc, circle, square.' There's also a 'Heading Indent' section with a note: 'The amount by which to indent each heading level (in CSS units). Example: 1em'. At the bottom, there are 'Select macro', 'Save', and 'Cancel' buttons. A red box highlights the 'Preview' section, which displays the following list:

- A Princess on Mars:
 - Chapter Three: My Adventure on Mars
 - Chapter Seven: Child-raising on Mars
 - Chapter Thirteen: Love on Mars

- Many format options available for the TOC
- Preview shows the structure indicated by your headings

Table of Contents Links

Dashboard / Teams In Space Home

Edit Save for later Watching Share

Travel Inspiration: A Princess on Mars

Created by Cassie O'Brien, last modified by Alena Grant just a moment ago.

I thought it would be nice to get travellers excited about their upcoming trips with some fiction about travel to Mars. Here are some excerpts from Edgar Rice Burroughs' novel "A Princess on Mars" from Project Gutenberg (public domain).

- A Princess on Mars
 - Chapter Three: My Adventure on Mars
 - Chapter Seven: Child-raising on Mars
 - Chapter Thirteen: Love on Mars

Link

A Princess on Mars

Chapter Three: My Adventure on Mars

I opened my eyes upon a strange and weird landscape. I knew that I was wide awake; I was not asleep; no need for pinching here; my inner consciousness tells you that you are upon Earth. You do not question the fact; neither mosquito-like vegetation which stretched around me in all directions nor even the outer verge of which I could distinguish the irregularities of low hills.

Chapter Thirteen: Love on Mars

Following the battle with the air ships, the community remained within the city for several days; abandoning the homeward march until they could feel reasonably assured that the ships would not return; for to be caught on the open plains with a cavalcade of chariots and children was far from the desire of even so warlike a people as the green Martians. During our period of inactivity, Tars-Tarkas had instructed me in many of the customs and arts of war familiar to the Tharks, including lessons in riding and guiding the great beasts which bore the warriors. These creatures, which are known as thorts, are as dangerous and vicious as their masters, but when once subdued are sufficiently tractable for the purposes of the green Martians.

Table of Children Pages

Edit 'Children Display' Macro

List all the children of a page (and possibly their children)
Documentation

Show children's children

Show Descendants

Parent Page

If not specified, the current page is used.

Number of Children

If not specified, no limit is applied.

Depth of Descendants

2

Heading Style

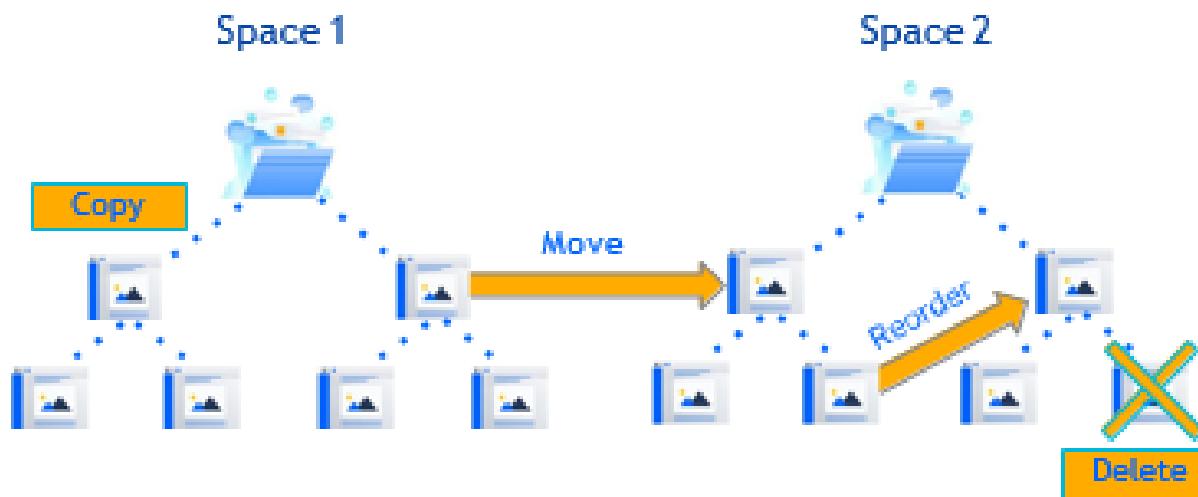
Select macro

Preview

- Jupiter Travel Programs
 - Jupiter Adventure Travel
 - Jupiter Overview
- Mars Travel Programs
 - Mars Overview
 - Mars Team Travel Brochure
- Meeting Notes
- Product Requirements
 - New Flight School Module: SeaSpaceRegister
 - New Flight School Module: SeaSpaceTeacher
- Itinerary Comparisons
- SeaSpaceEZ - Large Team Support
 - Teams in Space Demo Guide
- SeaSpaceEZ - Travel Providers
- Travel Inspiration: A Princess on Mars
- Summer Saturn Sizzle Blog Announcement
- Team Sprint Calendar
- Meet the SeaSpaceEZ Team

Save Cancel

Manipulating Pages in Confluence

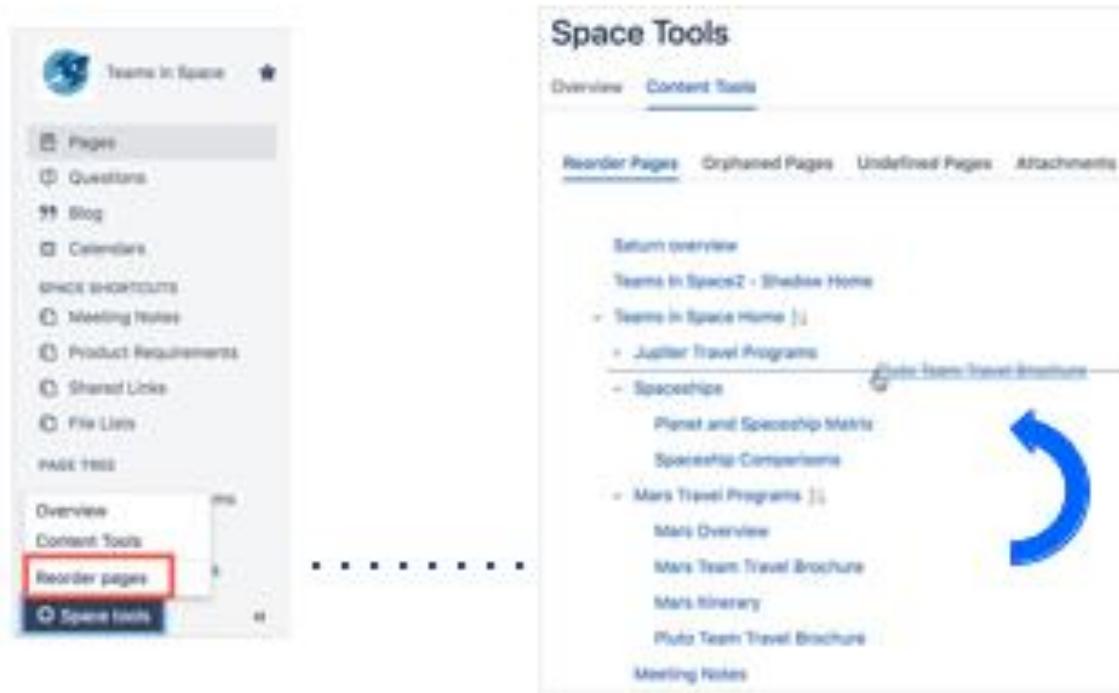


Reordering Pages

- Change the sort order
 - Alphabetically (default)
 - Or manually reorder (allows you to group pages to meet your needs)
- Change parent/child relationships
 - Promote or demote a page within the hierarchy



Space Tools: Reorder Pages



The screenshot shows the Confluence sidebar on the left and the 'Space Tools' page on the right.

Left Sidebar:

- Teams In Space
- Pages (highlighted with a red box)
- Questions
- Blog
- Calendars
- SPACE SHORTCUTS
- Meeting Notes
- Product Requirements
- Shared Links
- File Lists
- PAGE TREE
- Overview
- Content Tools
- Reorder pages (highlighted with a red box)
- Space Tools (highlighted with a blue box)

Right Page: Space Tools

Overview Content Tools

Reorder Pages Orphaned Pages Undefined Pages Attachments

Return overview

Teams In Space2 - Shadow Home

- Teams In Space Home [i]
 - Jupiter Travel Programs
 - Spaceship
 - Planet and Spaceship Matrix
 - Spaceship Components
- Mars Travel Programs [i]
 - Mars Overview
 - Mars Team Travel Brochure
 - Mars Itinerary
 - Pluto Team Travel Brochure
- Meeting Notes

A large blue circular arrow icon is positioned in the center of the page.

Copy, Move, or Delete a Page



Copy

A copy of the page is created in the same parent directory

Move

Move a page to a different space. Reordering pages moves them within the same space.

Delete

Any child pages will also be deleted. Move the children to a different parent to keep them. Any incoming links will be broken.

Setting New Location of Page

Current Page Location

Dashboard / Teams in Space Home >

Meet the SeeSpaceEZ Team

Created by Alana Grant, last modified on Sep 28, 2017

New space name & parent page

Move Page - 'Meet the SeeSpaceEZ Team'

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

New space: SeeSpaceEZ Dev Team

New parent page: See

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

SeeSpaceEZ Dev Team Home

SeeSpaceEZ Dev Team Home (SeeSpaceEZ Dev)

Current location: Teams in Space / Teams in Space Home

New location: SeeSpaceEZ Dev Team

Reorder Move Cancel

Reorder page when move

The screenshot illustrates the process of moving a page within a content management system. On the left, the 'Current Page Location' is shown as a breadcrumb trail: Dashboard / Teams in Space Home > Meet the SeeSpaceEZ Team. This page was created by Alana Grant and last modified on September 28, 2017. On the right, the 'Move Page' dialog box is open for the page 'Meet the SeeSpaceEZ Team'. The dialog allows specifying a new parent page by selecting a space and a title. The 'New space' dropdown is set to 'SeeSpaceEZ Dev Team', and the 'New parent page' dropdown has 'See' typed into it, with a dropdown menu showing 'SeeSpaceEZ Dev Team Home' selected. A red box highlights the 'New space' and 'New parent page' fields. Below the dialog, the 'Current location' is 'Teams in Space / Teams in Space Home' and the 'New location' is 'SeeSpaceEZ Dev Team'. At the bottom are 'Reorder', 'Move', and 'Cancel' buttons. A note at the bottom of the dialog says 'Reorder page when move' with a small blue arrow pointing right.

What is an Orphaned Page?

- A page without any incoming links
- You will not typically see this page while navigating
- Content can't be found easily
- Fix by either:
 - Deleting the page
 - Reordering the page

Space Tools

Overview Permissions Content Tools Look and Feel Integrations

Templates Reorder Pages Undefined Pages Attachments Trash

You can move any page by dragging it to a new position in the tree.

Satum overview
Teams In Space2 - Shadow Home
↳ Teams In Space Home

Orphaned pages



Undefined Pages

What happens to pages that never end up getting created after they have been referenced in a link?

Managing Undefined Pages

Space Tools

Overview Content Tools

Reorder Pages Undefined Pages Attachments RSS Feeds

An 'undefined' page is any page that has been linked to from within Confluence, but that does not yet exist.

Click on the page
to create it

Undefined Page	Linked From
Uranus Overview*	Spaceships (Teams in Space)
Undefined page links are marked with this icon	Page that references this page

Takeaways

- You can customize pages easily by:
 - Changing the layout,
 - Adding a TOC or many other options using macros
 - Reorder, move, or delete pages
- Fix an orphaned page by editing, deleting or moving the page

Lab 5 – Creating and Managing Pages



- Create and format a page using layouts
- Create and edit tables
- Add a table of contents to a page
- Change the page hierarchy by reordering
- Delete and copy pages
- Move a page to another space
- Optional - Manage orphaned and undefined pages

6. More Team Collaboration Features

What will you learn?



- Use follow and watch
- Share a page with another person
- Use the workbox to manage notifications

Communication Between Team Members

You are notified when someone

- Mentions you with @mention
- Shares a page/blog with you
- Comments on a page you're watching
- Likes a page you're watching



FOLLOW PEOPLE

Create a network of users who are important to you.

Follow a person and stay up to date on their activity

WATCH CONTENT

Watch a page, blog post, or space and stay on top of activity

Build Your Network by Following People

People Directory

All People

People with Personal Spaces

All People

Alana Grant
agrant@teams-in-space.com

Cassadee Owens
cowens@team...
Follow

Emmett Paris
eparis@teams-in-space.com

Alana Grant
agrant@teams-in-space.com

Alex Dupree
adupree@teams-in-space.com

Rita Jones
rjones@team...
More
Profile Page
Network Page

Harvey Jennings
hjennings@teams-in-space.com

Follow a new person by clicking
Follow in that person's profile

Alana's Network Page

Following

People you're following



Dakota Jones (djones)



Followers

People following you



Add new person to follow

What Can I Do with My Network?



- Go to Network page to view activity for people in your network:
 - New pages/blogs
 - New comments to pages or to existing comments
 - Updates to user profiles
- Subscribe to email notification of any activity within the network

Build a List of Content to Watch



You can watch

- Pages
- Blog posts
- Spaces

Pages & blogs only

Workbox notification:

- Comments
- Likes

Pages, blogs, & spaces

Email notification:

- Updates
- Comments
- Likes
- Deletions
- Attachments

Watch a Page

Dashboard / Teams in Space Home

Edit

Save for later

Watch

Share

...

Itinerary Comparisons

Created by Cassie Owens, last modified by Alana Grant about 3 hours ago

Each planet offers different locations and accommodations. Depending on the group that is travelling you may want to consider these issues:

Venus

- A good choice for short trips. It is close to earth at only 26 million miles (42 million kilometers)
- Very hot due to its close proximity to the sun
- Since it is the "planet of love", it may not be appropriate for all corporate travel needs

Mars

- A good choice for flexible travellers, as the distance between Mars and Earth can vary significantly due to their differences in orbits
- The beautiful red landscape will appeal to outdoor-oriented groups
- Can get crowded during high season due to the number of rovers that have been allowed to land on this planet

Saturn

ns and acco
want to con

Mars

- A good choice for gas giant
- Rings and moons are beautiful and mysterious
- Travellers must be able to adjust to a short day length of only 10 hours.

For budget-minded teams, the Summer Saturn Sizzle promotion has been extended

Edit

Save for later

Watch

Share

...

You are not watching this page

Start watching to receive email updates about changes to this page.

- Watch page
- Watch all content in this space

Watching

Share a Page

- Share a page with teammates
 - 1+ individuals, a group, an email address
- Share with externals
 - Send the page link
- Add message
- Request a review or an action from them
- One-time action

The screenshot shows a sharing dialog box overlaid on a web page. At the top right of the dialog, there are several buttons: 'Edit', 'Save for later', 'Watching', 'Share' (which is highlighted with a red box), and '...'. Below these are sections for sharing the page, adding people, and including a message. The 'Share this page' section contains a link 'http://uva182crgtjfgy4sb5b' with a 'Copy' button. The 'Add people' section has a text input field 'User name, group or email' and two entries: 'Alana Grant' and 'Mitch Davis', each with a delete icon. The 'Include a message' section contains the placeholder text 'Thought you might be interested in this page...'. At the bottom right of the dialog are 'Share' and 'Cancel' buttons.

Search

Edit Save for later Watching Share ...

Share this page

Share link

http://uva182crgtjfgy4sb5b Copy

Add people

User name, group or email

Alana Grant Mitch Davis

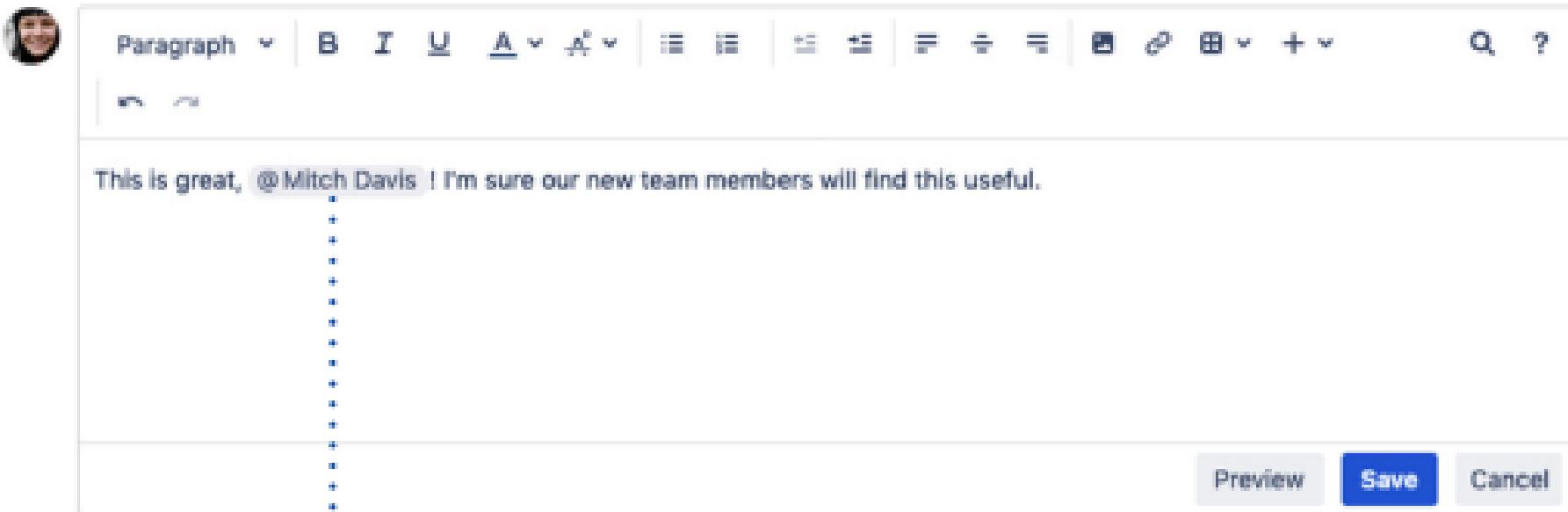
Include a message

Thought you might be interested in this page...|

Share Cancel

Example: Who Gets Notified?

Trigger: Alana's comment



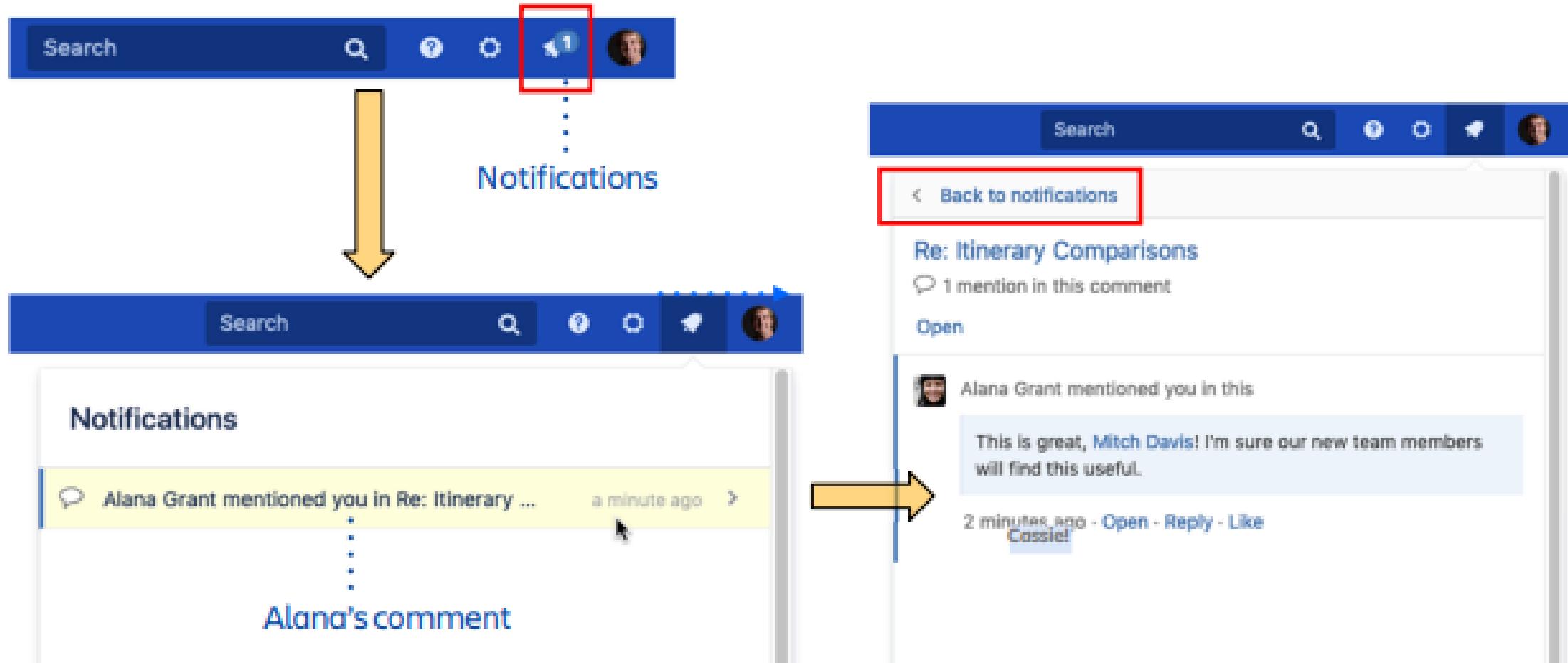
Mitch is notified because he's mentioned

All watchers of the page are notified

Everybody who liked the page is notified

All followers of Alana are notified

Accessing Notifications



Takeaways

- Expand your network by following people whose work you're interested in.
- Stay informed of any changes to a page by watching the page or blog post.
- Let others know what changes you've made by including them as Watchers to a page.
- Notifications are sent by email to the interested person and some types of activities can be viewed in their workbox.

Lab 6 – Use Team Collaboration Features of Confluence



- Using Follow and Watch
- Sharing a page with a coworker
- Using the workbox to manage notifications

7. Getting More From Pages

What will you learn?



- Use the expand macro
- Add labels to pages and attachments
- Import and export content to/from other file formats

The Expand Macro

- Expandable / collapsible section of text on a page
- Great for easy navigation within large blocks of text!



Jupiter Adventure Travel

Created by Mitch Davis; last modified by Alana Grant just a moment ago

Jupiter is the fifth planet from the Sun and the largest planet in the Solar System. It is a gas giant with mass one-thousandth of that of the Sun but is two and a half times the mass of all the other planets in the Solar System combined.

[Click here to expand...](#)

Jupiter is categorized as a gas giant, along with Saturn, Uranus and Neptune.



Jupiter Adventure Travel

Created by Mitch Davis; last modified by Alana Grant just a moment ago

Jupiter is the fifth planet from the Sun and the largest planet in the Solar System. It is a gas giant with mass one-thousandth of that of the Sun but is two and a half times the mass of all the other planets in the Solar System combined.

[Click here to expand...](#)

- Radius: 43,441 miles (69,911 km)
- Mass: 1.898E27 kg (317.8 Earth mass)
- Surface area: 23.71 billion sq miles (61.42 billion km²)
- Gravity: 24.79 m/s²
- Distance from sun: 483,800,000 miles (778,500,000 km)

Jupiter is categorized as a gas giant, along with Saturn, Uranus and Neptune.

Insert the Expand Macro

Jupiter Adventure Travel

Jupiter is the fifth planet from the Sun and the largest planet in the Solar System. It is two and a half times the mass of all the other planets.

Expand

- Radius: 43,441 miles (69,911 km)
- Mass: 1.898E27 kg (317.8 Earth mass)
- Surface area: 23.71 billion sq miles (61.42 billion km²)
- Gravity: 24.79 m/s²
- Distance from sun: 483,800,000 miles (778,500,000 km)
- ⋮

Jupiter is categorized as a gas giant, along with Saturn, Uranus and Neptune.

Paste the collapsed
text in here

Edit 'Expand' Macro

Embeds an expandable text box into your page. [Documentation](#)

Title

Click here to expand...

⋮

Change title of the expandable text box

Select macro

Save Cancel

Labels to Pages & Attachments

- Labels are keywords you add to pages and attachments
- Adding labels helps you group and find content easily
- Many macros use labels



Adding Labels to Pages & Attachments

The screenshot shows a page editor interface for a page titled "Travel Inspiration: A Princess on Mars". The top navigation bar includes links to "Teams in Space", "Dashboard", "Teams in Space Home", and the current page. There is also an "Edit page" button with a pencil icon and a "Labels" button with a tag icon. A large orange arrow points from the "Labels" button on the page header down to the "Labels" section in the main content area.

The main content area has a "View page" link and a "Labels" section. The "Labels" section displays the message "No labels" with a tag icon. An orange arrow points from this message to the "Labels" section. Below this, there is an "Add" button next to an empty input field. Underneath the input field, there are two existing labels: "sales" and "fy20", each with a small "X" icon to their right.

At the bottom of the page, there is a tooltip: "Shortcut tip: In page view, pressing I also opens this dialog box". To the right of the tooltip is a "Close" button. A large orange arrow points from the tooltip towards a modal dialog box.

The modal dialog box contains the text "sales" and "fy20" from the previous list, each in its own button-like container. It also features a small tag icon at the bottom right. An orange arrow points from the tooltip in the main content area to this modal dialog box.

Displaying Labeled Content

The diagram illustrates the display of labeled content. At the top left, there are two buttons: 'sales' and 'fy20'. The 'fy20' button is highlighted with a red border and a yellow arrow points from it to the text 'Labeled content' below. To the right, a list of items is shown, each with a small icon, a title, a date, an author, and a 'fy20' label. To the right of the list is a box labeled 'Related Labels + sales' with a vertical dotted line connecting it to the 'sales' button at the top.

sales fy20

Labeled content

This list shows content tagged with the following label: fy20

To add a label to the list of required labels, choose '+ labelname' from Related Labels.

- Jupiter Travel Programs
Mar 13, 2019 • Mitch Davis
fy20
- Mars Travel Programs
Mar 13, 2019 • Alana Grant
fy20
- Teams in Space Home
Sep 13, 2018 • Alana Grant
sales fy20

Related Labels
+ sales

Related Labels

Searching for Labels

fy20 X

FILTER BY

-
-
-
-
-
-

2 search results Search tips

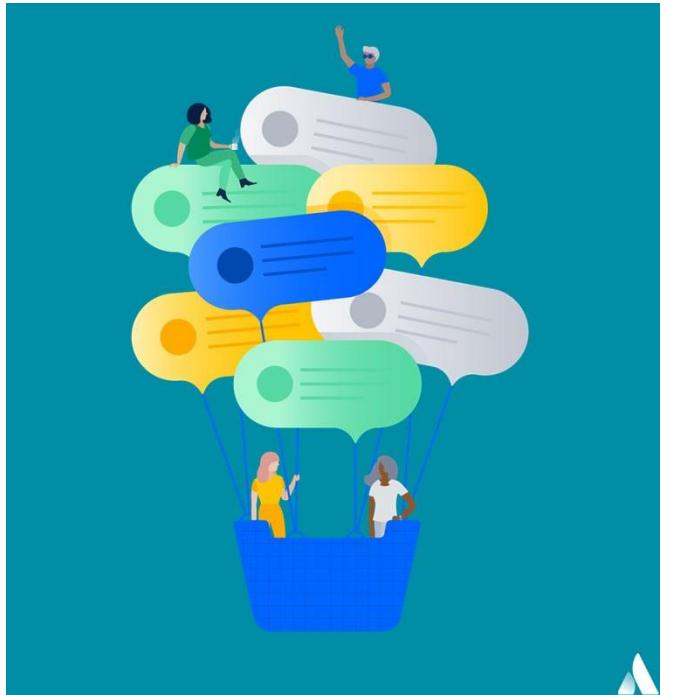
 Jupiter Travel Programs Teams in Space Mar 13, 2019 fy20	 Mars Travel Programs Teams in Space Mar 13, 2019 fy20
---	--

Labels found

[Advanced search](#)

Think About It

- Do you have Word content that you'd like to use in Confluence?
- Do you ever wish you could share Confluence content with external clients?



Importing External Content

Import Word content into Confluence

Can be used to create a new page or pages automatically

Import PDFs as attachments and view using attachments viewer

Exporting Confluence Content

Export Confluence page to PDF or Word format

Can then be shared externally

Importing Word Content as Confluence Page

Export/Import options



Dashboard / Teams in Space Home / Summer Saturn Sizzle Blog Announcement

Children on Mars

Import Word Document: Upload

Upload: Choose File No file chosen

Next

Import Word Document > Upload file

Setting Import Options

- Root page title
- Where to import
 - Location in page hierarchy
- Title conflicts
 - Rename/replace/remove conflicting page
- Split by heading
 - Import as a single page, or multiple pages based on heading sections

Dashboard / Teams in Space Home / Summer Saturn Sizzle Blog Announcement

Children on Mars

Import Word Document: Configuration

Root page title: Children on Mars

Where to import:

- Import as a new page in the current space
- Replace Children on Mars
- Delete existing children of Children on Mars

Title conflicts:

- Rename imported pages if page name already exists
- Replace existing pages with imported pages of the same title
- Remove existing pages with the same title as imported pages

Split by heading:

Document Outline: Children-on-Mars

Import

Single New Page Imported to Confluence

Source: Word

Instructors for Flight School Curriculum

Instructor Name	Experience	Classes to Teach
Deena Williams	Worked at Boeing for 20 years as a mechanical engineer	Intro to Rocket Mechanical Systems
Ken Watson	In addition to having been a commercial pilot, Ken taught GPS courses at Penn State for 5 years	Navigational Systems
Pippa Freeman	Taught astronomy at NYU	Astronomy
Stan Grayson	Worked for American Airlines in their internal training department	Customer Service Skills for Pilots

Confluence

Instructor info

Created by Alana Grant just a moment ago

Instructors for Flight School Curriculum

Instructor Name	Experience	Classes to Teach
Deena Williams	Worked at Boeing for 20 years as a mechanical engineer	Intro to Rocket Mechanical Systems
Ken Watson	In addition to having been a commercial pilot, Ken taught GPS courses at Penn State for 5 years	Navigational Systems
Pippa Freeman	Taught astronomy at NYU	Astronomy
Stan Grayson	Worked for American Airlines in their internal training department	Customer Service Skills for Pilots

 Like Be the first to like this

No labels 

Exporting a Page to PDF or Word

- Open the page you wish to export
- Select Export to PDF or Export to Word
- Browser saves the exported file to Downloads
- Can share with people outside of Confluence

The screenshot shows the 'Teams in Space Home' page. At the top, there's a dark header bar. Below it, the page title 'Teams in Space Home' is displayed. A green sidebar on the left contains the message 'Welcome to your new space! Confluence spaces are great for sharing content and news with your team. This is the home page for Teams in Space. Right now it shows recent space activity, but you can customize this page in anyway you like. Scroll along the left-hand side to see important pages in this space.' Below the sidebar, there are two main sections: 'Recent space activity' and 'Space contributors'. The 'Recent space activity' section lists three items: 'Alana Grant' (updated yesterday at 4:14 PM), 'Children on Mars' (created yesterday at 4:12 PM), and 'Dakota Jones' (New Flight School Module: DotspaceTeacher created May 10, 2018). The 'Space contributors' section lists five users: Alana Grant (20 hours ago), Dakota Jones (208 days ago), Alex Chappie (209 days ago), Terry Chapin (211 days ago), and Caesar Quinn (217 days ago). A 'Show More' button is located at the bottom of the activity list.

Takeaways

- ✓ Use the expand macro
- ✓ Add labels to content to categorize and find easily
- ✓ Import content in Word or PDF formats
- ✓ Export Confluence page to PDF or Word format

Lab 7 - Getting More from Pages



- Exercise 1 - Using the Expand macro
- Exercise 2 - Adding Labels to Pages
- Exercise 3 - Importing and Exporting Content

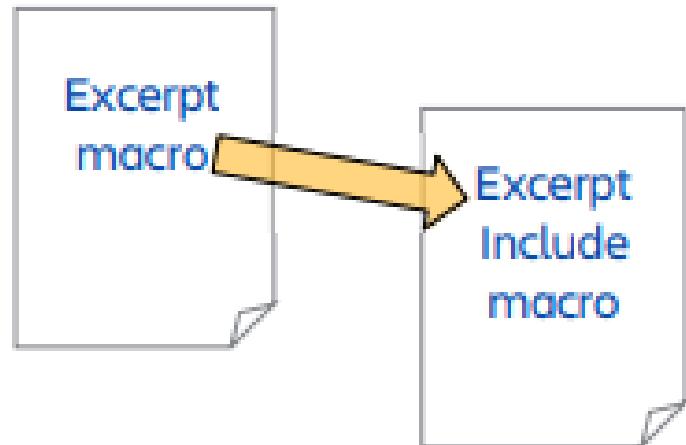
8. Using Advanced Macros

What will you learn?



- Use Macros to Reuse Content
- Use Macros to Create Reports
- Explore the Atlassian Marketplace

Reusing Page Content



Edit 'Excerpt' Macro

Mark a section of a page as an excerpt for page summaries.

[Documentation](#)

Hide Excerpted Content

⋮
⋮

[Hide text on current page](#)

Preview

Jupiter is the fifth planet from the Sun and the largest planet in the Solar System. It is a gas giant with mass one-thousandth of that of the Sun but is two and a half times the mass of all the other planets in the Solar System combined.

Excerpt

Jupiter is the fifth planet from the Sun and the largest planet in the Solar System. It is a gas giant with mass one-thousandth of that of the Sun but is two and a half times the mass of all the other planets in the Solar System combined.

[Edit](#)

[Remove](#)



[Display on new line](#)

[Display inline](#)

[Save](#) [Cancel](#)

[Paste in excerpt content](#)

Including Excerpts

Insert 'Excerpt Include' Macro

Include the excerpt from one page
within another page

Page Containing the Excerpt *

Remove Surrounding Panel

Preview

Excerpt Include | Jupiter Overview

Edit

Go to Included Page

Remove

Planet Descriptions

Created by Alana Grant just a moment ago

Jupiter Overview

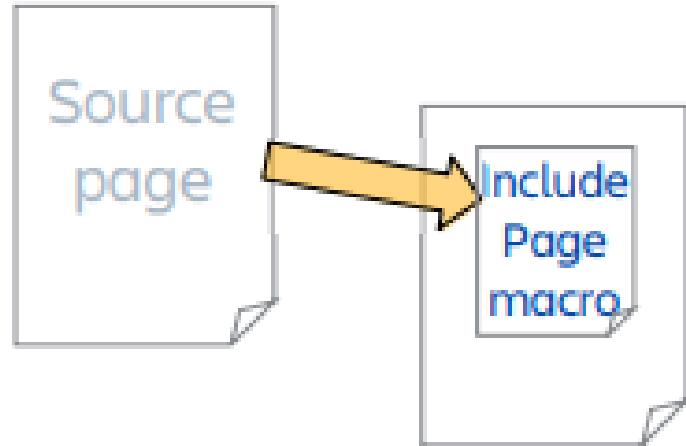
Jupiter is the fifth planet from the Sun and the largest planet in the Solar System. It is a gas giant with mass one-thousandth of that of the Sun but is two and a half times the mass of all the other planets in the Solar System combined.

Select macro

 Like Be the first to like this

No labels 

Including a Whole Page



Insert 'Include Page' Macro

Include the excerpt from one page
within another page [Documentation](#)

-

+

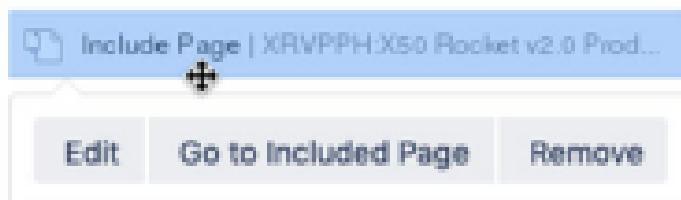
⋮

⋮

⋮

Preview

Page to be included



Select macro

Insert Cancel

Content Report Table

Edit 'Content Report Table' Macro

Provides a content report in table format, based on labels.

[Documentation](#)

Labels to report on ······

planets

Enter one or more labels to report on.

Spaces to report on ······

Enter one or more space keys to report on.

Show Comments count
Add the column that displays numbers of comments

Show Likes count
Add the column that displays numbers of likes

Preview

Title	Creator	Modified
Jupiter Overview	Mitch Davis	about 2 hou...
Mars Overview	Alana Grant	Mar 13, 2019
Itinerary Comparisons	Cassie Owens	Mar 13, 2019

Select macro Save Cancel

Content by Label

Edit 'Content by Label' Macro Help

Labels to report on Label *

Add filter

Order by Sort By Options

Reverse Sort
Used only in conjunction with the 'Sort By' parameter.

Maximum Number of Pages

List Title

Select macro

Preview

- Itinerary Comparisons (Teams in Space)
planets
- Jupiter Overview (Teams in Space)
planets
- Mars Overview (Teams in Space)
planets

Filter selection

Label *

With ancestor

Contributor

Created

Creator

Label

Maximum Number of Pages

Page Properties

Page properties

Program Manager	@ Mitch Davis
Document Status	DRAFT
QA	@ Terry Chaplin
Next Review	31 Dec 2020
⋮	⋮
⋮	⋮
⋮	⋮

2-columns table with keys and values

Edit 'Page properties' Macro

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. Documentation

Page properties ID (optional)

Hidden

- Hide the contents of this macro when viewing this page. Content will still be displayed in the Page Properties Report macro.
- ⋮
- ⋮

Preview

Program Manager	@ Mitch Davis
Document Status	DRAFT
QA	@ Terry Chaplin
Next Review	31 Dec 2020

Select macro

Save Cancel

Page Properties Report

Insert 'Page properties report' Macro [Help](#)

Labels to report on Label *

Spaces to report on In space Current space

Add filter Add a filter

Options Show

Display more options

Preview

Title	Document Status	Next Review	Program Manager	QA
Mars Travel Programs	DRAFT	31 Jul 2020	@Alana Grant	@Terry Chaplin
Jupiter Travel Programs	DRAFT	31 Dec 2020	@Mitch Davis	@Terry Chaplin

Select macro [Insert](#) [Cancel](#)

Takeaways

- ✓ Use Excerpt, Excerpt Include, and Page Include Macro to Reuse Content
- ✓ Use Content Report Table, Content by Label, and Page Properties to Create Reports

Lab 8 - Using Apps



- Exercise 1 - Creating and Displaying Excerpts
- Exercise 2 - Including Pages into Pages
- Exercise 3 - Creating a Page Properties Report

9. Integration with Jira

What will you learn?



- Use the product requirements blueprint with a link to a Jira issue
- Use the Jira Issue/Filter macro



What is Jira?

An issue tracking and project management system that integrates with Confluence

Linking Confluence to Jira



Using a Confluence Product Requirements Page



Plan Requirements

Settle upon a list of requirements for the project or feature

Create Document

Use the Product Requirements blueprint to create the page in Confluence. Create issues in Jira from within the requirements page.

Track Progress

See status of requirements at a glance in your page and view them directly in Jira. Link the page to other related Jira issues.

Creating Product Requirements Page

Assign a target release (version#)

Start with the Product Requirements blueprint and add more details

Important sections:

- Page properties
- Requirements

List all requirements here

Assign an epic (parent issue) for all listed requirements

Other important roles assigned

Target release	1.0
Epic	
Document status	DRAFT
Document owner	@ Terry Chaplin
Designer	
Developers	@ Kevin Campbell
QA	@ Cassie Owens

Requirements

#	Title	User Story	Importance	Notes
1	Design website homepage	User would like to be able to login and quickly access their itinerary	Must be accessible from mobile as well as computer	+ Use alternate methods of logging in (username or email or frequent flyer
2	Create Itinerary page	User wants to be able to change seats, print Itinerary		
3	Develop itinerary modification functionality	User needs their modifications to itinerary to be implemented	Very important that this be done in a secure manner	

Other Useful Fields in Product Requirements



Goals, Backgrounds, & Assumptions

Three fields helpful for providing rationale for the feature



User Interactions

Diagrams, visual designs, or other interactive graphical tools to help describe the effort



Questions

Capture concerns and/or uncertainties



Not Doing

Clarify the scope of the feature by specifying what you won't be doing

Generating Jira Issues from the Product Requirements Page

- After publishing page...
 - Highlight the title for one of your issues and click the Jira icon
 - Enter issue details for the selected issue
 - Or, generate issues for all requirements in your table

The screenshot illustrates the workflow for generating Jira issues. It consists of two main parts: a requirement table and a Jira creation dialog.

Requirement Table: A table titled "Requirements" with a "Create Jira issue" button. The first row shows a requirement with ID 1, title "Design website homepage", and description "User would like to be able to login and quickly access their itinerary". The "Create Jira issue" button is highlighted with a red box and a cursor icon.

Create Task Dialog: A modal dialog titled "Create task" with a "Create multiple issues from table" button, which is also highlighted with a red box. The dialog includes fields for "Summary" (set to "Design website homepage") and "Description" (set to "User would like to be able to login and quickly access their itinerary"). There are also "Teams In Space" and "Story" buttons, and "Create" and "Cancel" buttons at the bottom.

Jira Links in Requirements Table

After creating Jira issue.
Issue key **TIS-60** initial status is **Open**

#	Title	User Story	Importance	Notes
1	Design website homepage  TIS-60 OPEN	User would like to be able to login and quickly access their itinerary	Must be accessible from mobile as well as computer	<ul style="list-style-type: none">• Use alternate methods of logging in (username or email or frequent flyer #)
2	Something else	User wants to be able to blah, blah	Low priority	

#	Title	User Story
1	Design website homepage  TIS-60 IN PROGRESS	User would like to be able to login and quickly access their itinerary

TIS-60 status changes as work progresses

Alternative Way to Add Jira Issue to a Page

Select + > Insert Jira Issue/Filter

- Add existing Jira issue by searching for issue key
- Create new issue

Can be inserted anywhere on the page

The image shows two screenshots illustrating the process of adding a Jira issue to a page.

The top screenshot is a "Insert Jira Issue/Filter" dialog. It has a search bar at the top with the text "TIS-4". Below the search bar are sections for "Search", "Create New Issue", and "Recently Viewed". Under "OTHER JIRA CONTENT", there are links for "Jira Charts" and a "Jira Links" section. A red box highlights the "Jira Links" section, which contains a card for "TIS-4". The card displays the issue key "TIS-4", the summary "Next Generation version of SeeSpaceEZ travel platform", and a link to "View".

The bottom screenshot shows a Jira issue card on a page titled "Next Gen Product Requirements". The card has the following details:

Target release	1.0
Epic	TIS-4 - Next Generation version of SeeSpaceEZ travel platform [OPEN]
Document status	DRAFT
Document owner	@Terry Chaplin
Designer	
Developers	@Kevin Campbell
QA	@Cassie Owens

A red box highlights the "Jira Links" button in the header of the Jira card, indicating where it was inserted from the dialog above.

Adding Sortable Tables of Issues

Using **Insert Jira Issues/Filter**, you can also:

- Add a table of issues
- Sort by table headers
- Use JQL to define your search

Insert Jira Issue/Filter

⋮

Search "Epic link" = TIS-4

Q

Recently Viewed

Search using any issue key, search URL, Jira link, JQL, plain text or filter

Status					
Key	Summary	Assignee	P	Status	
TIS-60	Design website homepage	Alana Grant	?	IN PROGRESS	
TIS-38	Suggested Destinations	Ryan Lee	?	OPEN	
TIS-37	When requesting user details the service should return prior trip info	Jennifer Evans	?	OPEN	
TIS-10	Bad JSON data coming back from hotel API	Max Taylor	?	OPEN	
TIS-9	After 100,000 requests the SeeSpaceEZ server dies	Jennifer Evans	?	OPEN	
TIS-8	Requesting available flights is now taking > 5 seconds	Max Taylor	?	OPEN	
TIS-7	500 Error when requesting a reservation	Emmet Paris	?	OPEN	
7 issues		↻ Refresh			

Configure Jira Issue/Filter Table

Insert Jira Issue/Filter

project = TIS

Search using any issue key, search URL, Jira link, JQL, plain text or filter

Key Summary

Display options

⌘+Shift+J in the editor to quickly access this dialog.

Insert Cancel

Display as

- Single issue
Display the macro as a single issue.
- Total issue count
Display total number of issues as a link. E.g. 46 issues
- Table
Customise your columns below.

Maximum issues

Leave empty to get all issues.

Columns to display

Key Summary Issue Type Created
Updated Due Date Assignee Reporter
Priority Status Resolution

Select Macro Hint: type "Cmd+Shift+J" in the editor to quickly access this dialog.

Insert Cancel

Takeaways

- ✓ Use the product requirements blueprint with a link to a Jira issue
- ✓ Use the Jira Issue/Filter macro

Lab 9 -Connecting to Jira



- Exercise 1 – Generating a Jira issue from within Confluence

10. Page History & Restrictions

What will you learn?

- Compare versions of a page using page history
- Restrict access to pages

Working with Page History

A new version is created when the page is edited. Use Page History feature to:

- Track history of changes in a page
- Compare versions
- Rollback to a previous version
- Delete a version



Accessing Page History

The screenshot shows a Jira page titled "SeeSpaceEZ Product Requirements". The page header includes links for "Edit", "Save for later", "Watching", and "Share". A context menu is open on the right side, with the "Page History" option highlighted by a red box. The menu also contains options like "Attachments (17)", "Resolved comments (0)", "View in Hierarchy", "View Source", "Export to PDF", "Export to Word", "Import Word Document", "Copy", "Move", and "Delete".

Dashboard / Teams in Space Home Edit Save for later Watching Share

2 Jira links

SeeSpaceEZ Product Requirements

Created by Terry Chaplin, last modified by Diana Quent just a moment ago

Target release	1.0
Epic	<input checked="" type="checkbox"/> TIS-4 - Next Generation version of SeeSpaceEZ travel platform
Document status	DRAFT
Document owner	@Terry Chaplin
Designer	
Developers	@Kevin Campbell
QA	@Cassie Owens

Goals

- Get it right!

Background and strategic fit

This feature is in response to user complaints that booking flights and excursions is confusing on our website. It was decided to focus on improving the user interface for the next release and also provide a mobile interface.

Viewing Page History

Compare
versions

Dashboard / Teams in Space Home / SeeSpaceEZ Product Requirements

[View Page](#) [Save for later](#) [...](#)

Page History

[Compare selected versions](#)

Version	Published	Changed By	Comment	Actions
<input checked="" type="checkbox"/> CURRENT (v. 7)	Dec 12, 2018 13:20	 Alana Grant		
<input checked="" type="checkbox"/> v. 6	Dec 12, 2018 13:17	 Alana Grant		Restore Delete
<input type="checkbox"/> v. 5	Dec 11, 2018 15:10	 Alana Grant		Restore Delete
<input type="checkbox"/> v. 4	Dec 10, 2018 18:56	 Alana Grant		Restore Delete
<input type="checkbox"/> v. 3	Dec 10, 2018 14:10	 Terry Chaplin		Restore Delete
<input type="checkbox"/> v. 2	Dec 10, 2018 13:48	 Terry Chaplin		Restore Delete
<input type="checkbox"/> v. 1	Dec 10, 2018 13:45	 Terry Chaplin		Restore Delete

[Return to Page Information](#)

Comparing Versions

Dashboard / Teams in Space Home / SeeSpaceEZ Product Requirements

View Page Save for later ...

Page History

Versions Compared

6	Current
Alana Grant about 2 hours ago	Alana Grant about 2 hours ago

[View Page History](#)

This was added in the current version ······

Background and strategic fit

This feature is in response to user complaints that booking flights and excursions is confusing on our website. It was decided to focus on improving the user interface for the next release and also provide a mobile interface.

Assumptions

- Users will ultimately access this feature from mobile device

Key

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

Restoring to an Earlier Version

Dashboard / Teams in Space Home
/ SeeSpaceEZ Product Requirements

View Page Save for later ...

Page History

Compare selected versions

Version	Published	Changed By	Comment	Actions
<input type="checkbox"/> CURRENT (v. 7)	Dec 12, 2018 13:20	 Alana Grant		... +
<input checked="" type="checkbox"/> v. 6	Dec 12, 2018 13:17	 Alana Grant		Restore Delete
<input type="checkbox"/> v. 5	Dec 11, 2018 15:10	 Alana Grant		

[Restore to version 6](#)

Dashboard / Teams in Space Home
SeeSpaceEZ Product Requirements

View Page Save for later ...

Unpublished changes will be lost!
Only hit OK if you're sure there aren't any unpublished changes you need to keep.

Revert page

Comment: Reverted from v. 6

OK Cancel

Page history retention rules

Confluence administration

Retention rules

Choose how long to keep data that's no longer needed, such as trash or page history. A scheduled job removes this data in small batches, every ten minutes, to minimise the impact on your site. You can override the retention rules for specific spaces by adding an exemption below. [Learn more about retention rules](#)

Global retention rules

Attachment versions	6 months
Page versions	2 years
Trash	6 months

Space exemptions

Exemptions allow you to set different retention rules for individual spaces. Space administrators may also be able to add exemptions for their spaces. [Learn more about space exemptions](#)

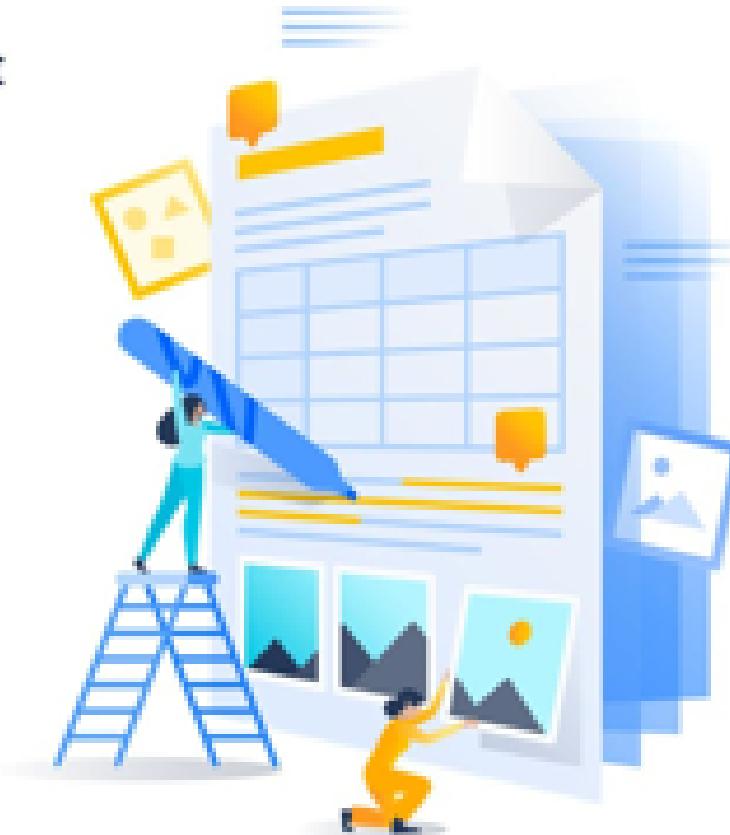
Space	Space key	Last updated	Last edited by	Attachments	Pages	Trash	Actions
Design team	DESIGN	4 Nov 2021	Dima Darboe	Keep all	6 months	6 months	...
Finance team	FT	10 Nov 2021	Jim Yang Song	Keep all	Keep all	Keep all	...
People team	HR	29 Nov 2021	Ivan Perez	Keep all	Keep all	2 years	...
VR project	VP	3 Dec 2021	Jane Risterson	7 days	10 versions	7 days	...

Controlling Page-Level Access

- Sometimes individual page owners need to restrict access to the page
- Individuals can set restrictions for:
 - Who can view a page
 - Who can edit a page



Different than the global access control of a Confluence admin



Restricting Edit Permission

Only Alana & Cassie can edit

The screenshot shows the Confluence 'Restrictions' configuration page and a dashboard view.

Restrictions Page:

- Editing restricted: Everyone can view, only some can edit.
- Type a user name or group: Can edit (Add button)
- Everyone: Can view
- Alana Grant: Can edit
- Cassie Owens: Can edit (Remove button)

Confluence Dashboard:

- Confluence logo, Spaces, People, More, Create, Search, Watch, Share, ...
- Dashboard / Teams in Space Home
- Save for later (button highlighted with a red box)
- Watch
- Share
- ...
- 2 Jira links
- SeeSpaceEZ Product Requirements
- Created by Terry Chaplin, last modified by Alana Grant 4 minutes ago

Annotations:

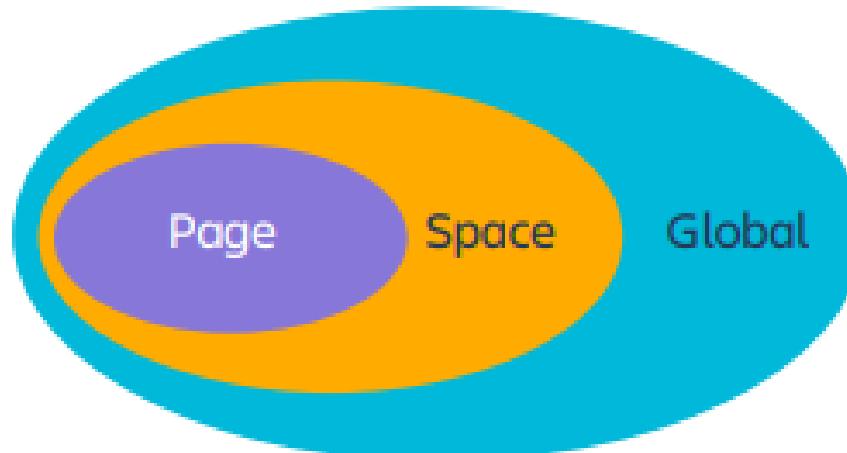
- A blue box highlights the 'Can edit' row for Alana Grant and Cassie Owens in the restrictions list.
- A red box highlights the 'Save for later' button in the dashboard header.
- A red dashed arrow points from the 'Save for later' button to the text 'No Edit button for Mitch'.
- The text 'Only Alana & Cassie can edit' is positioned to the left of the restrictions list.
- The text 'No Edit button for Mitch' is positioned to the right of the dashboard view.

Levels of Permission in Confluence

Global permissions, e.g.:

- Can use
- Create space(s)
- Create personal space
- Confluence/System Administrator

Confluence/System
Admin



Space permissions, e.g.:

- Add/Delete pages
- Add/Delete blogs
- Add/Delete attachments
- Add/Delete comments
- Add/Delete restrictions
- Delete own

Space Admin

Takeaways

- ✓ Compare versions of a page using page history
- ✓ Restrict access to pages

Lab 10- Page History & Restrictions



- Exercise 1 – Comparing versions of a page
- Exercise 2 – Restricting access to a page

Appendix A: Creating & Administering Spaces

What will you learn?



- Create a space from a blueprint
- Archive and delete a space
- Modify a space's look and feel
- Modify and promote blueprints in a space
- Export a space

Create as Many Spaces as You Like



- Many types of spaces available
- Many blueprints available
- Must have Create Space permission



Welcome to Confluence



Welcome to Confluence

Creating a New Space

Create space

Filter Help

- Blank space Start with a blank space.
- Documentation space Create and manage technical documentation for your products.
- Software project space Create software requirements, capture meeting notes, and track decisions.
- Personal space Keep your notes, task lists and other content organized.
- Knowledge base Capture and share best practices and solutions to common problems.
- Team space** Collaborate and share resources with your team.

Next Close

Flexible but more work

Specify team members when you create space

Spaces created from a blueprint:

- Have customized homepage & sidebar
- May also contain page blueprints & sample content

Using the Team Space Blueprint

Enter team members

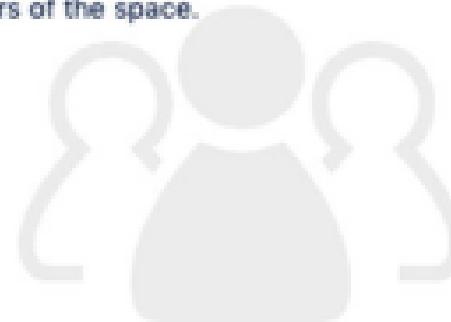
卷之三

Create team space

Space name*	Flight School
Space key*	FS
Team members	 Mitch Davis <small>x</small>  Terry Chaplin <small>x</small>  Cassie Owens <small>x</small>  Alana Grant <small>x</small>
Description	The new space for Teams in Space Flight School

About team spaces

Share knowledge and collaborate on projects, processes and procedures with your team. They will be notified about this space and all updates. Team members will be granted permissions and added as watchers of the space.



Back

创见

[Close](#)

Click Create

New Space from Team Space Blueprint

Flight School

Pages

Blog

Calendars

SPACE SHORTCUTS

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

PAGE TREE

Get started by adding some pages to this space. [Create page](#)

Dashboard

Flight School

Created by Mitch Davis 8 minutes ago

Welcome

This is the home page for your team space within Confluence. Team spaces are great for sharing knowledge and collaborating on projects, processes and procedures within your team.

Next, you might want to:

- Customize the home page - Click "Edit" to start editing your home page
- Create additional pages - Click "Create" to choose a blank page or template
- Write a blog post - Click "Create" and select "Blog Post" to share news
- Manage permissions - Click "Space Tools" and select "Permissions" in the sidebar to manage what users members see

The team

Mitch Davis

Terry Chaplin

Sabota Jones

Alex Dupree

About us

Space tools

Creating and Customizing Spaces



Create a space from a
blueprint

Archive & delete a space

Modify a space's look & feel

Modify & promote blueprints

Space Tools: Archiving a Space

The screenshot illustrates the process of archiving a space in the Space Tools interface. It consists of two main parts: a left sidebar and a right modal dialog.

Left Sidebar (Space Tools Overview):

- The title "Space Tools" is at the top.
- A navigation bar with tabs: **Overview** (highlighted with a red border), Permissions, Content Tools, Look and Feel, and Integrations.
- Below the tabs, there are two buttons: **Space Details** (highlighted with a blue underline) and **Delete Space**.
- On the far left, there is a vertical list of categories: **+**, **+**, **+**, **+**, **+**, **+**, **+**, **+**, **+**, **+**, **+**.
- A blue arrow points from the **Edit Space Details** button on the sidebar to the **Edit Space Details** dialog on the right.

Right Dialog (Edit Space Details):

- The title is "Edit Space Details".
- Fields:
 - Name: Flight School
 - Description: The new space for Teams in Space Flight School
 - Status: A dropdown menu with options **Current** (selected with a checked checkbox) and **Archived** (highlighted with a blue background).
 - Home page: Flight School
- Text: "The page that displays when users navigate to this space."
- Buttons: **Save** and **Cancel**.

Text Labels:

- Space Tools menu > Overview > Space Details > Edit
- Set Status to Archived

Space Tools: Deleting a Space

- You must be *in the space* you wish to delete
- Cannot be undone
- Archiving is a better alternative

Space Tools

Overview Permissions Content Tools Look and Feel Integrations

Space Details Delete Space

Deleting a space will delete all its content (including pages, comments, attachments and blogposts)

WARNING
This operation **cannot be undone**. Once the space is deleted, it cannot be retrieved. It will be gone forever.

Are you sure you want to delete this space with space key TS and name Test Space?

OK Cancel

Creating and Customizing Spaces



Create a space from a blueprint

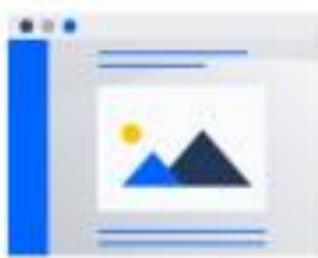


Archive & delete a space

Modify a space's look & feel

Modify & promote blueprints

Transforming Your Space



Editing Home Page

Format and customize welcome message
Remove unwanted content
Add images & other content



Creating Pages

Add pages for team collaboration
Add meeting notes and events
Add blogs



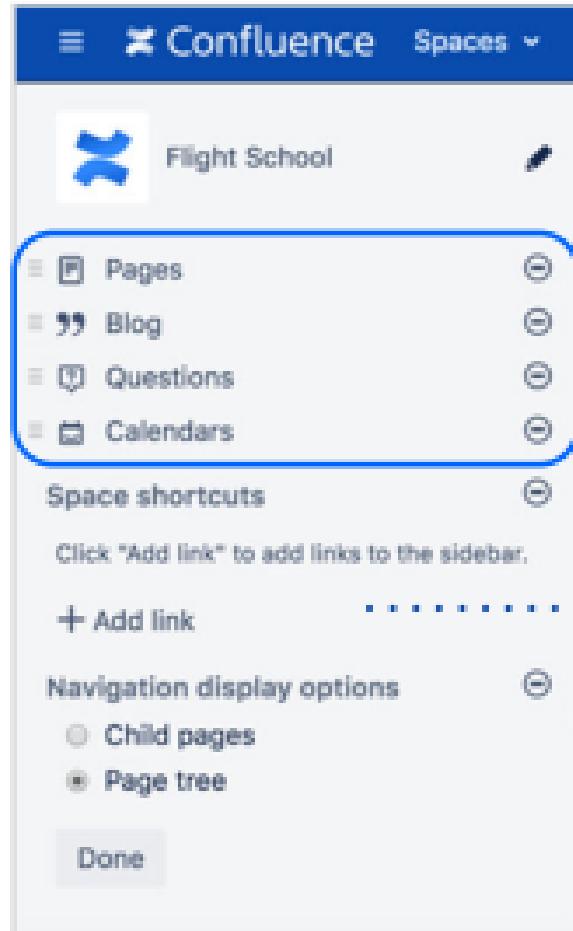
Configuring Sidebar

Add a logo
Edit the elements that appear in the sidebar
Configure page navigation options

Configuring the Sidebar

From the Space Tools, select **Configure Sidebar**

Set page navigation options



Change or set a logo

Remove or reorder content view options

Add links to other useful pages as space shortcuts

Viewing Pages in a Space

PAGE TREE

- ▼ Jupiter Travel Programs
 - Jupiter Adventure Travel
 - Jupiter Overview
- ▼ Mars Travel Programs
 - Mars Overview
 - Mars Team Travel Brochure
 - Mars Itinerary
 - Pluto Team Travel Brochure
- Spaceships

All parent and child hierarchies

CHILD PAGES

- ↳ Teams in Space Home
- Spaceships
- Spaceship Comparisons
- Planet and Spaceship Matrix

+ Create child page

Children of the current page

Changing the Look & Feel

Space Tools

Overview Permissions Content Tools **Look and Feel** Integrations

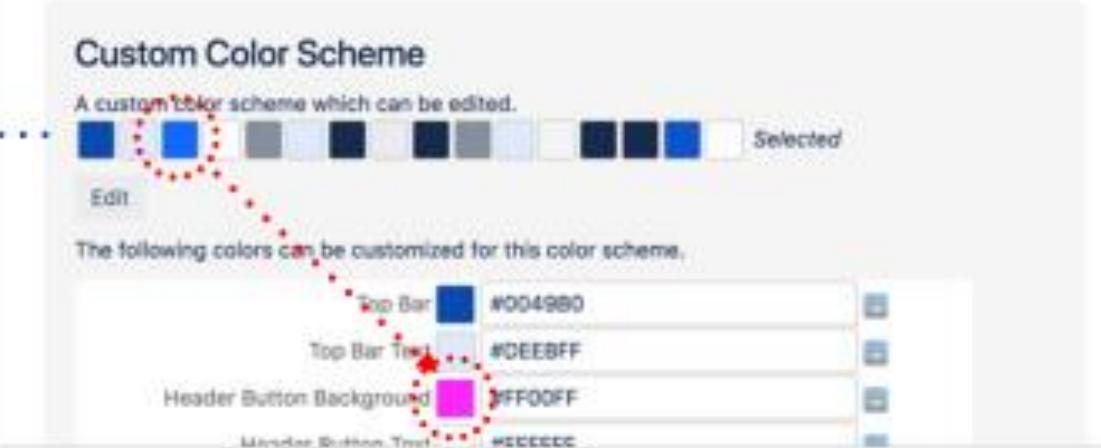
Themes Color Scheme Layout Stylesheet Sidebar, header and footer PDF Layout PDF Stylesheet

Here you can customize the look of this Confluence space.
Note: Any modifications done here will override the default color-scheme and default decorators, set up by your administrator.

Global Color Scheme

This color scheme will use the globally defined color scheme for this space.

Current Default ······  Select

Customize here ······ 

The Custom Color Scheme dialog box contains the following information:

- Custom Color Scheme**: A custom color scheme which can be edited.
- Selected**: A color swatch in the global palette.
- Edit**: A button to edit the color scheme.
- The following colors can be customized for this color scheme.**
- Top Bar**: #004980
- Top Bar Text**: #DEEBFF
- Header Button Background**: #FF00FF
- Link Color, Button Text**: #CCCCCC

Example: Change Header Button Background

Space Tools

Overview Permissions Content Tools **Look and Feel** Integrations

Themes **Color Scheme** Layout Stylesheet Sidebar, header and footer PDF Layout PDF Stylesheet

Here you can customize the look of this Confluence space.
Note: Any modifications done here will override the default color-scheme and default decorators, set up by your administrator.

Global Color Scheme

This color scheme will use the globally defined color scheme for this space.

 Select

Custom Color Scheme

A custom color scheme which can be edited.

 Selected

Edit

Save **Reset** **Cancel**

Creating and Customizing Spaces



Create a space from a
blueprint



Archive & delete a space



Modify a space's look & feel

Modify & promote blueprints

Modifying or Promoting a Blueprint Template



Modify a Blueprint

Want to remove or add a section to a blueprint?

Edit it & save it just as with any other page!

Restore original if needed.



Promote a Blueprint

Want to encourage use of a specific blueprint?

Promote it to the top of the blueprints list!

Unpromote it to restore original location

Editing a Blueprint

- From the Space Tools page, select **Content Tools > Templates**
- Click **Edit**

Space Tools

Overview Permissions Content Tools Lock and Feel Integrations

Templates Reorder Pages Undefined Pages Attachments Trash Export Import RSS Feeds

User Created Templates

Create New Template

Templates are a great way to help you standardize your documentation and enable your team quickly get started writing content. You have no templates specific to this space yet, create your first one to get started.

Blueprint templates

What are Blueprints?

Team Calendars Blueprint

Promote · Disable

Edit

Default Index page template

Unpromote · Disable

Edit

Share links Blueprint

Edit

Share a link

Edit

Shared links

Promote · Disable

Edit

Product Requirements Blueprint

Edit

Product requirements

Edit

Product Requirements Index



Be careful not to remove any macros that the blueprint uses

Adding a New Section with Instructional Text

Instructional
text inside the
new section . . . ➔

Instructional text inside the new section . . . ➔

strategic fit

How does this relate to your overall product strategy?

Issue Status

General statement or add a table of issues linked to you can sort by status.

Blueprint templates

What are Blueprints?

Template	Action
Team Calendars Blueprint	Promote - Disable
Default index page template	Edit
Share links Blueprint	Promote - Disable
Share a link	Edit
Shared links	Edit
Product Requirements Blueprint	Promote - Disable
Product requirement	Edited (circled in red)
Product Requirements Index	Edit

Indicates "Edited"
Can Reset to default . . .

Promoting a Blueprint

After promoting

The screenshot shows the 'Create' dialog box. At the top right, there is a 'Product Requirements Blueprint' card with the title 'Product requirements (Edited)'. To the right of this card is a 'Promote · Disable' button with a tooltip: 'Promoted blueprints display at the top of the Create dialog. Unpromoted blueprints and templates will be collapsed below it.' Below the card, the main area of the dialog lists several blueprint options. One option, 'Product requirements', is highlighted with a dark blue background and white text. A red box highlights the 'Show more' link below it. To the right of the dialog, the text 'Causes the rest of the blueprints to appear' is written in blue.

Product Requirements Blueprint

Product requirements (Edited)

Promote · Disable

Promoted blueprints display at the top of the Create dialog. Unpromoted blueprints and templates will be collapsed below it.

Create

Select space Teams in Space

Product requirements
Define, track, and scope requirements for your product or feature.

Show more

Causes the rest of the blueprints to appear

Add or customize templates for the selected space

Create Close

Create from Template Macro

Teams in Space Home

Created by Alana Grant, last modified just a moment

Create Product Requirements

Welcome to your new space! Confluence spaces are great for sharing activity, but you can customize this page.

Click this button to create a new Product Requirement page

Insert 'Create from template' Macro

Embed a button in your content which enables users to create content from any pre-defined template.

Button text:

Template name:

Name of the template to create the new page from.

Title of page to be created:

You can use @currentDate, @spaceName or @spaceKey to have those values inserted for you.

Space key:

Select macro:

Create from template configuration options

Creating and Customizing Spaces



Create a space from a blueprint



Archive & delete a space



Modify a space's look & feel



Modify & promote blueprints

Exporting a Space

- Use **Space Tools > Content Tools** to export an entire space to:
 - **HTML**
 - **XML**
 - **PDF**
- Must have **Export space** permission (this is typically the Confluence admin)

Space Tools



Export Formats

Export content within this space in several formats.

- HTML**
Use the HTML format to export this space.
- XML**
XML exports can be reimported in Confluence.
- PDF**
Export this space as PDF.

[Next >>](#)

Export to HTML

- Normal export
 - Generates HTML content for all pages & attachments
 - Excludes blogs
 - Comments are optional
- Custom export – selected pages only

Export HTML Options

Export content within this space as HTML.

Normal Export

Generates a HTML file for each page in this space, excluding blogs, comments, and attachments.

Custom Export

Generates a HTML file of selected pages based on options that you choose from below.

Includes:

Include comments

Choose pages to export:

Select All · Deselect All

Saturn overview

Teams in Space Home

Jupiter Travel Programs

Jupiter Adventure Travel

Jupiter Overview

Mars Travel Programs

Mars Overview

Mars Itinerary

Mars Team Travel Brochure

Pluto Team Travel Brochure

Spaceships

Planet and Spaceship Matrix

Spaceship Comparisons

Meeting Notes

Product Requirements

Export to XML

- Creates a zipped XML file
- Can be imported into another Confluence instance
- Full export
 - Includes invisible pages, attachments, & blogs
 - Comments are optional
- Custom export – selected pages only

Export XML Options

Export the space to a zipped XML file. You can import the XML file into earlier Confluence versions from 5.9.1 to 6.11.2, and into compatible later versions. When importing, please refer to the compatibility information on your [Confluence Backup & Restore administration page](#).

Full Export (includes pages not visible to you)

Generates an XML file for each page in this space, including those not visible to you. The export includes comments and attachments, but excludes blog posts.

Custom Export

Generates a XML file of selected pages based on options that you choose from below.

Export

Export to PDF

- Good choice for printed documentation
- Normal export
 - Generates a PDF file with a TOC for navigation
 - Includes only image attachments
 - Excludes blogs & comments
- Custom export - selected pages only

Export PDF Options

Export content within this space as PDF. You can customize the layout and styling of this exported PDF in the [PDF Stylesheet](#) page.

 If a table contains images that exceed the width of the PDF page, part of the table may be cut off. [Learn more](#)

Normal Export

Generates a PDF file for each page in this space, excluding blogs, comments, and attachments.

Custom Export

Generates a PDF file of selected pages based on options that you choose from below.

Export

Example: PDF Export

The screenshot shows a Confluence page titled "TIS-051218-1304-12.pdf" with a progress bar indicating the export is 100% complete. A red oval highlights the page number "1 / 17" in the top right corner of the header. Another red oval highlights the "Download here" link in the progress bar.

Running task
Exporting Space - In Progress

Exporting Space

Time Elapsed: 5 seconds
Time Remaining: Unknown (estimated)
Completion: 100% complete

Export complete! [Download here.](#)

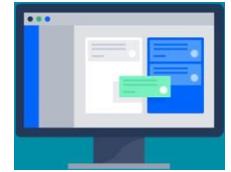
Creates a multi-page PDF file with TOC

Section	Page Number
1. Saturn Overview	1
2. Teams in Space Home	2
2.1 Jupiter Travel Programs	2
2.1.1 Jupiter Adventure Travel	2
2.1.2 Jupiter Overview	2
2.2 Mars Travel Programs	3
2.2.1 Mars Overview	3
2.2.2 Mars Odyssey	3
2.2.3 Mars Team Travel Brochure	4
2.2.4 Pluto Team Travel Brochure	5
2.3 Spaceships	5
2.3.1 Planets and Spaceship Matrix	5
2.3.2 Spaceship Comparisons	6
2.4 Meeting Notes	6
2.5 Product Requirements	6
2.5.1 New Flight School Module: SeeSpaceRegister	6
2.5.2 New Flight School Module: SeeSpaceTeacher	6
2.6 Itinerary Comparisons	7
2.7 SeeSpaceEZ - Large Team Support	8
2.7.1 Teams in Space Demo Guide	8
2.8 SeeSpaceEZ - Travel Providers	9
2.9 Travel Inspiration: A Princess on Mars	10
2.9.1 Poem by Rumi	10
2.10 Summer Saturn Sizzle Blog Announcement	11
2.10.1 Children on Mars	11
2.11 Team Sprint Calendar	12
2.12 Meet the SeeSpaceEZ Team	12
2.13 Shared Links	13
2.13.1 Space-Doddy - International Space Station Version	13
2.14 2014-02-22 Meeting Notes	14
2.15 File Lists	14
2.16 Orphan Page	15
2.17 Itineraries for Uranus Travel	15
2.17.1 Uranus Overview	15
2.17.1.1 Research Flowchart	15

Takeaways

- ✓ Create a space from a blueprint
- ✓ Archive and delete a space
- ✓ Modify a space's look and feel
- ✓ Modify a blueprint for a space
- ✓ Export a space

Lab A - Creating and Administering Spaces



- Exercise 1 - Creating a space
- Exercise 2 - Archiving and deleting a space
- Exercise 3 - Modifying the look and feel of a space
- Exercise 4 - Modifying a blueprint
- Exercise 5 - Exporting a space

Appendix B: Groups & Permissions

What will you learn?



- Outline groups and permissions
- Configure space permissions

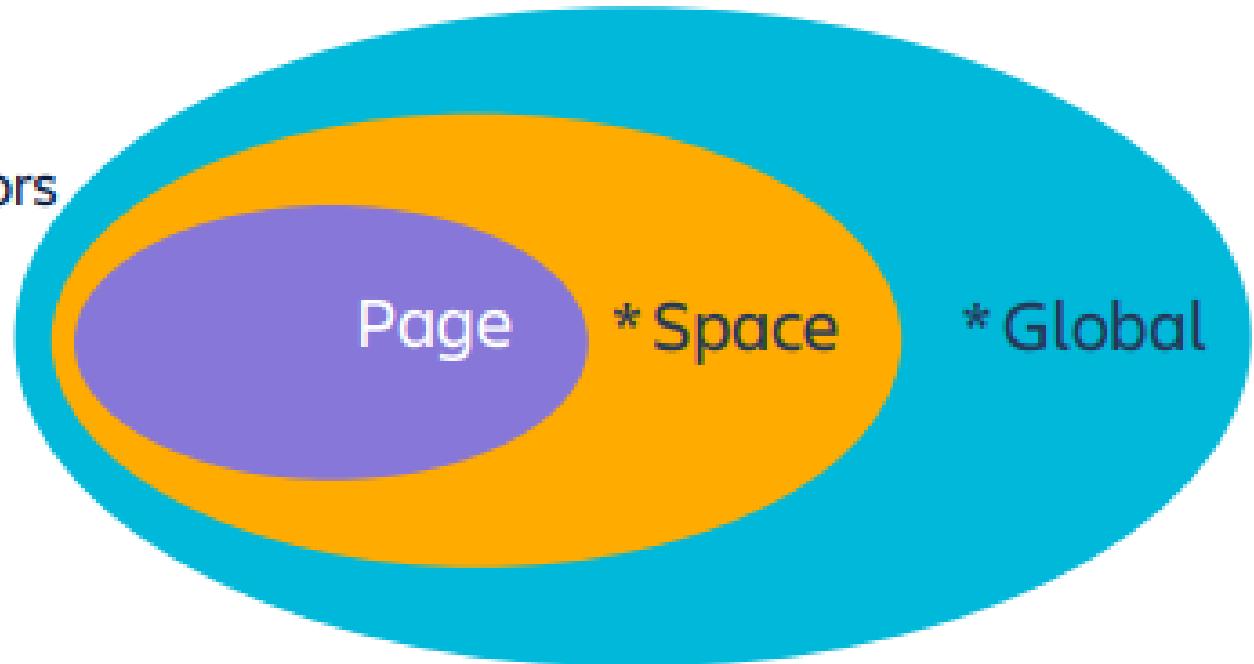
Levels of Permission in Confluence

Space & global permissions

- Typically Confluence administrators set permissions

Page permissions

- End users can set page-level permissions



* Covered in this module

Group Membership Example

- Confluence users
 - Terry, Alex, Dakota
- Confluence administrators
 - Mitch, Admin
- Travel program managers *
 - Terry, Cassie

Users assigned to multiple groups have cumulative permissions

EXAMPLE

Terry can create spaces

* Has *Create Space* permission

Global Permissions & Group Membership

		Global Permissions permissions			
		Personal Space [?]	Create Space(s) [?]	Confluence Administrator [?]	System Administrator [?]
confluence-administrators		✓ can use	✓	✓	✓
confluence-users		✓ can use	✗	✗	✗

Assigned to users by group membership

Groups  confluence-users
 jira-users
 travel-program-managers

Group Permissions

The screenshot shows the Confluence Administration interface. A blue circle labeled '1' points to the 'Global Permissions' link in the left sidebar under the 'USERS & SECURITY' section. A red box highlights the 'Edit Permissions' button in the top right corner of the main content area. A blue arrow points from the 'General configuration' menu item in the top navigation bar down to the 'Edit Permissions' button.

Confluence administration

View Global Permissions

Global permissions define what people can do in your site. You can grant permissions to groups and individuals, and choose to open up your site to anonymous users.

See [Global Permissions overview](#) to find out more about managing permissions for your entire Confluence site.

Licensed Users

Groups

Grant permissions for the entire site to all the members of a group.

	Personal Space [1]	Create Space(s) [1]	Confluence Administrator [1]	System Administrator [1]
confluence-administrators	can use	can use	can use	can use
confluence-users	can use	can use	can use	can use
jira-administrators	can use	can use	can use	can use
jira-users	can use	can use	can use	can use

Individual Users

Grant permissions to individual users, regardless of which groups they are a member of.

No users currently have individual global permissions.

Add Permission to a Group

Edit Global Permissions

Global permissions define what people can do in your site. You can grant permissions to groups and individuals, and choose to open up your site to anonymous users.

See [Global Permissions overview](#) to find out more about managing permissions for your entire Confluence site.

Licensed Users

Groups

Grant permissions for the entire site to all the members of a group.

	Personal Space [?]	Create Space(s) [?]	Confluence Administrator [?]	System Administrator [?]
confluence-administrators [?]	<input checked="" type="checkbox"/> can use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
confluence-users	<input checked="" type="checkbox"/> can use	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
jira-administrators	<input checked="" type="checkbox"/> can use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
jira-users	<input checked="" type="checkbox"/> can use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Grant browse permission to Search Add

Confluence-users can now create a personal space

Members of the Confluence-Users Group

Group Members: confluence-users

[« Back to Groups](#)

[Add Members](#)

User	Username	Email	
System Admin	admin	admin@teams-in-space.com	
Alex Dupree	adupree	adupree@teams-in-space.com	
Alana Grant	agrant	agrant@teams-in-space.com	
Cassie Owens	cowens	cowens@teams-in-space.com	
Dakota Jones	djones	djones@teams-in-space.com	
Emmet Paris	eparis	eparis@teams-in-space.com	
Mitch Davis	mdavis	mdavis@teams-in-space.com	
Terry Chaplin	tchaplin	tchaplin@teams-in-space.com	

Space Permissions

Groups assigned to spaces

The same globally defined groups can be assigned access to specific spaces.

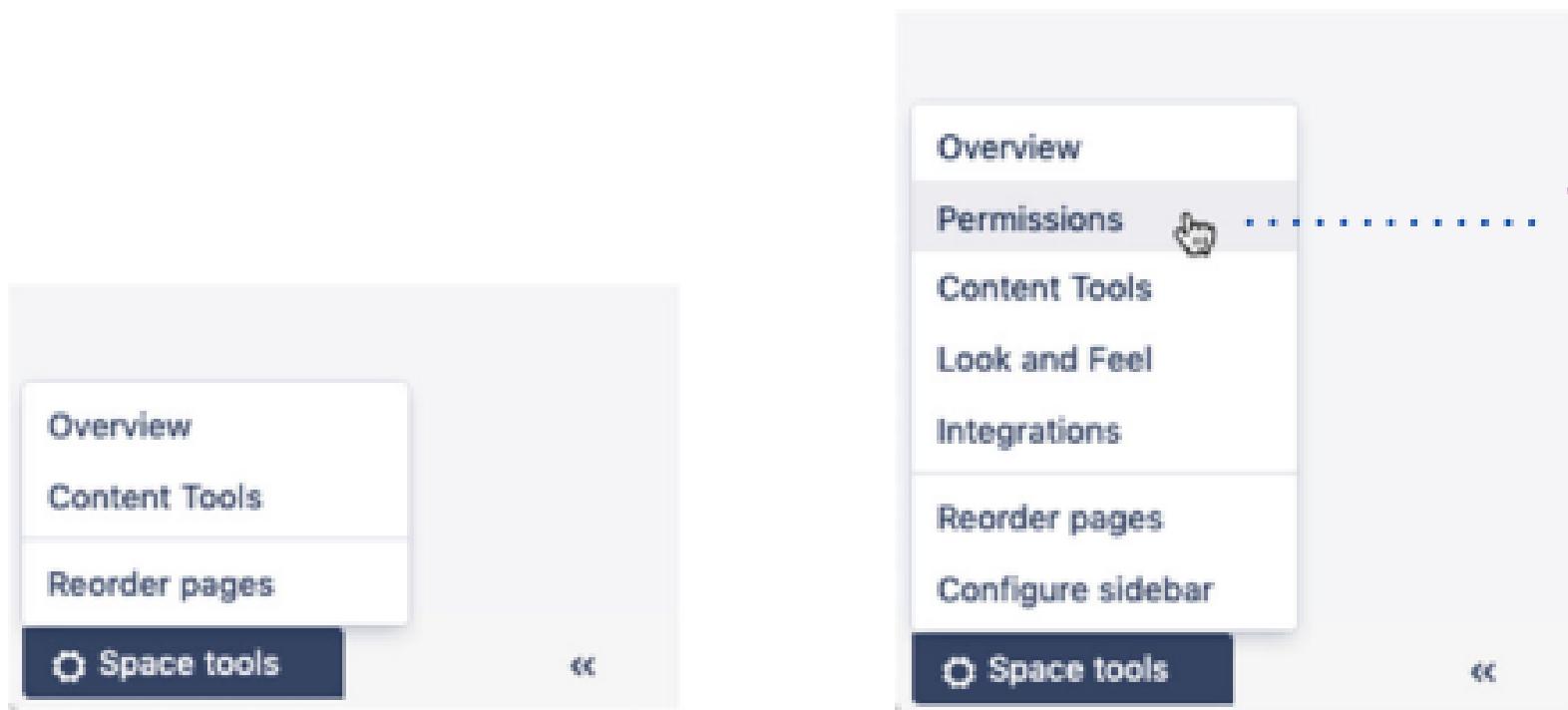
Permissions set per space

Space-level permissions can be set per group, per individual, or per anonymous user.

Space permissions

Each space has its own set of permissions that can be granted & revoked by a space administrator.

Space Tools



The space admin can change permissions

Setting Space Permissions

Licensed Users

Groups

Grant permissions for this space to all the members of a group.

	All		Pages		Blog		Attachments		Comments		Restrictions		Mail		Space	
	View	Delete	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin		
confluence-users	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗
jira-users	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗

Edit Permissions

Takeaways

- ✓ Outline groups and permissions
- ✓ Configure space permissions

Lab B - Configuring Space Permissions



- Exercise 1 - Configuring space permissions