

CONFLUENCE KNOWLEDGEBASE

For Project Management

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SECTION 1

Getting started with Confluence

Designed for new Confluence users, these self-paced lessons cover the basics, including common terms, key concepts, and core product features like spaces and pages.

This section will cover:

- 1. What is Confluence?**
- 2. Basic terms in Confluence**
- 3. Start navigating in Confluence**

1. What is Confluence?

By the end of this lesson, you'll be able to:

- Explain what Confluence is used for and how it helps teams
- Understand the role differences between admin and an end-user

What is Confluence?

- **Confluence is a tool to create, store and share information.**
- **Think of Confluence as the "central hub" for all your team's work:** a place where you can easily create and find the information you need to do your job.

CREATE INFORMATION

- Create documents
- Build how-to materials
- Brainstorm ideas
- Capture thoughts
- Plan new projects

STORE INFORMATION

- Store resources
- Organize documents
- Easily find the information you need

SHARE INFORMATION

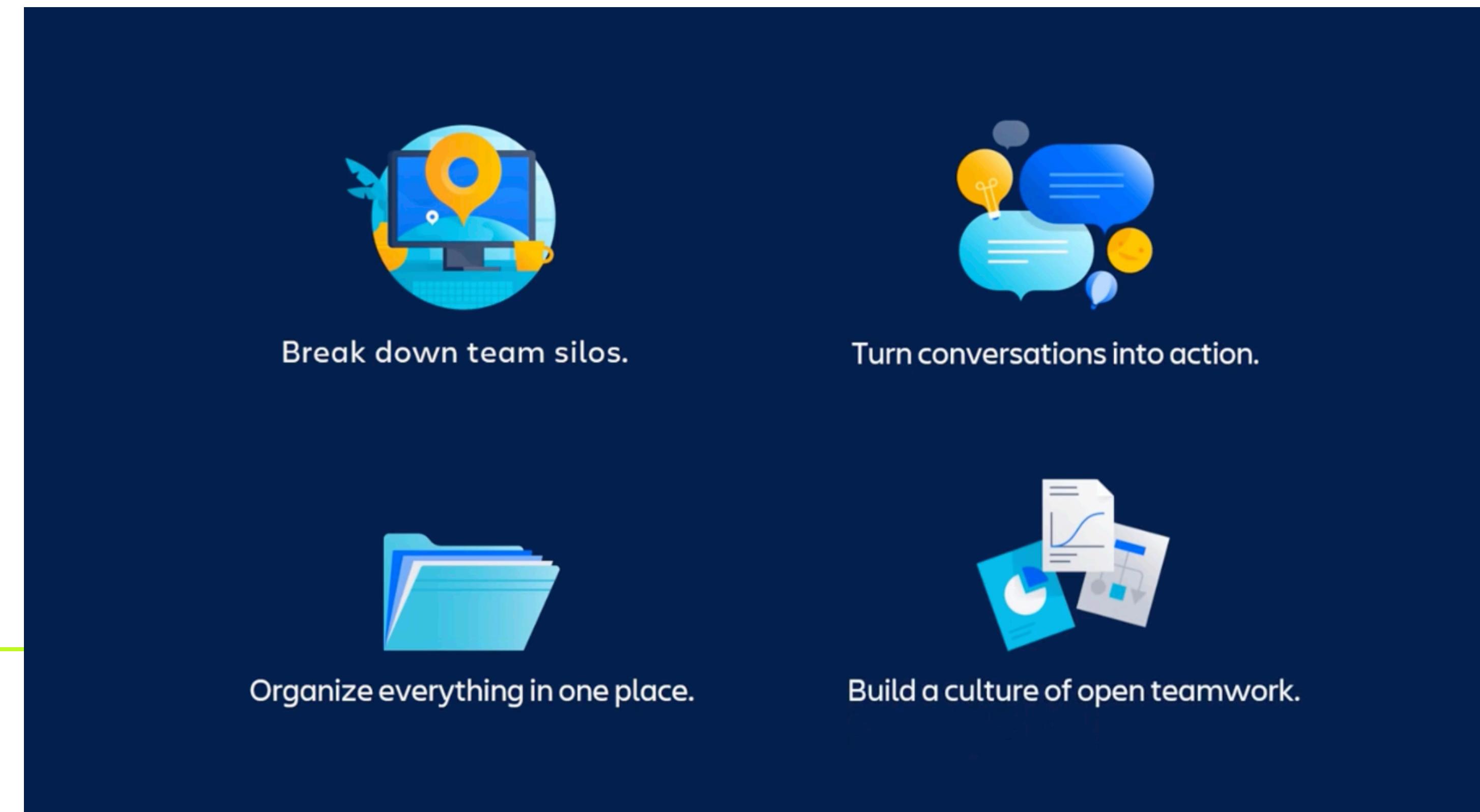
- Share projects
- Give and receive feedback
- Collaborate across teams

NOTE: All types of teams use Confluence, from marketing to human resources. Regardless of the size or function, Confluence can help every team be more transparent, efficient, and collaborative.

Why does your team use Confluence?

Confluence is a flexible tool. It can be used to solve many different types of problems. Recognizing how your team is using Confluence will help you optimize your experience.

For example, if your team uses Confluence to manage knowledge, you'll focus on finding and organizing content. If your team uses Confluence to collaborate on projects, you'll focus on sharing files and commenting.



How will you use Confluence?

There are two roles in Confluence users and admins.

Users:

Write content in Confluence
Organize their personal content
Comment on teammate's content
Collaborate with teammates
Refer to documentation and policies

This is probably you!

Admins:

Set up site-wide organization and settings
Manage what users have permission to do in Confluence
Gather analytics about how users work in Confluence
Create and manage global templates

Along with being a better teammate, using Confluence can help you be a better leader and employee.

As you start using Confluence, you'll see that it helps you:

- ✓ Communicate and socialize your ideas with well-structured content
 - ✓ Find essential resources you need to do your job
 - ✓ Brainstorm and document your most important ideas
 - ✓ Give and receive feedback with teammates in real-time
 - ✓ Stay in the loop on your team's work
-

QUIZ

What does Confluence do?

- A. Acts as a help desk for customers to submit tickets through a portal
- B. Helps your team plan, track, and ship work
- C. Enables you to create, store, and share information
- D. Stores code in a collaborative repository

QUIZ ANSWER

What does Confluence do?

- A. Acts as a help desk for customers to submit tickets through a portal
- B. Helps your team plan, track, and ship work
- C. Enables you to create, store, and share information**
- D. Stores code in a collaborative repository

[Confluence enables you and your team to create, store, and share information.]

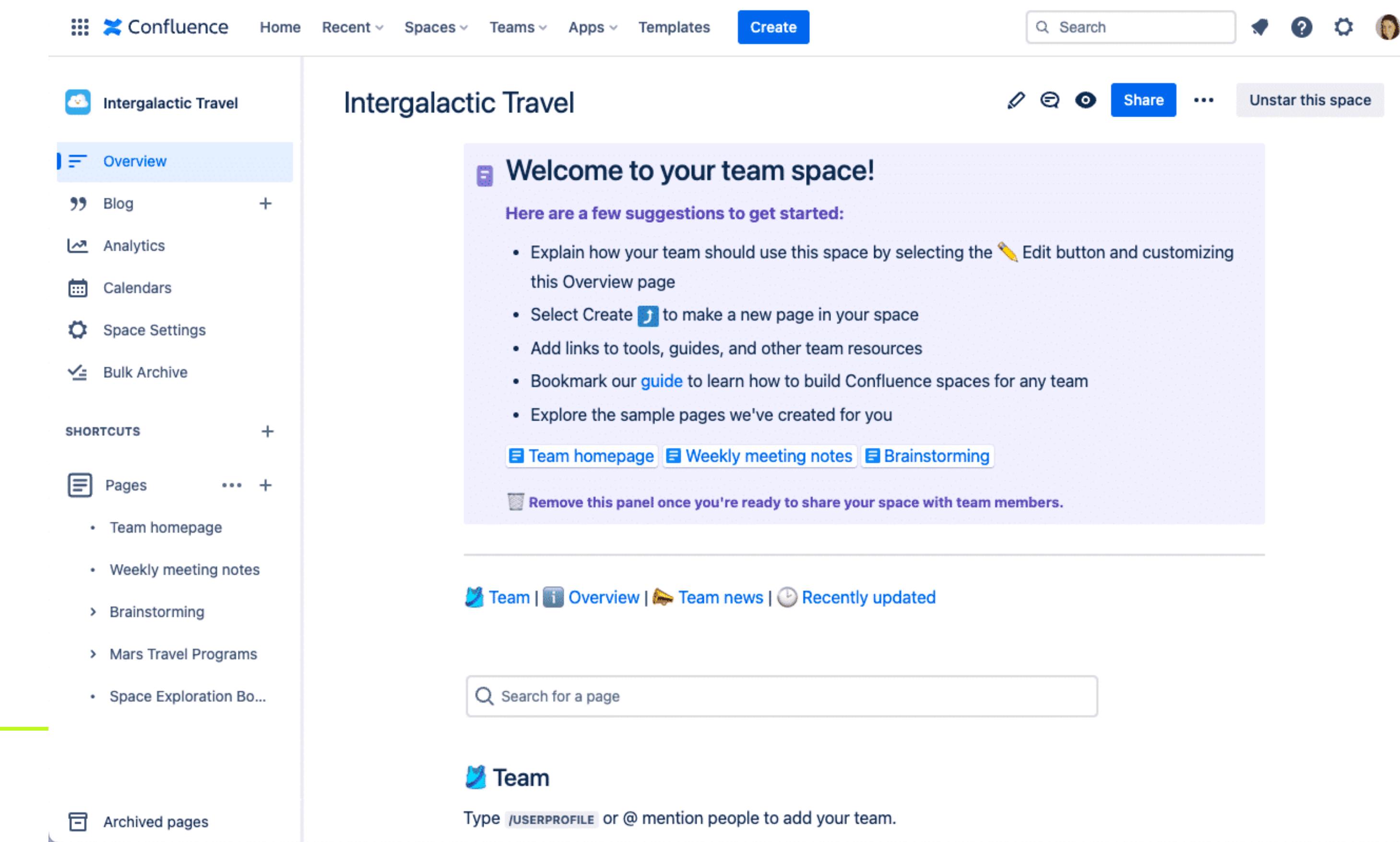
2. Basic terms in Confluence

By the end of this lesson, you'll be able to:

- Define pages and spaces
- Understand how pages and spaces relate in Confluence

What is a space?

- A space is a **collection** of related documents.
- Your team may have hundreds of documents contained within a single **space**. Spaces help organize documents into meaningful categories.



The screenshot shows the Confluence interface for the 'Intergalactic Travel' space. The top navigation bar includes 'Confluence', 'Home', 'Recent', 'Spaces', 'Teams', 'Apps', 'Templates', a 'Create' button, a search bar, and user profile icons. The left sidebar has sections for 'Overview' (selected), 'Blog', 'Analytics', 'Calendars', 'Space Settings', 'Bulk Archive', 'SHORTCUTS' (with 'Team homepage', 'Weekly meeting notes', 'Brainstorming'), 'Pages' (with 'Team homepage', 'Weekly meeting notes', 'Brainstorming', 'Mars Travel Programs', 'Space Exploration Bo...'), and 'Archived pages'. The main content area displays a 'Welcome to your team space!' message with suggestions for customization, links to 'Team homepage', 'Weekly meeting notes', and 'Brainstorming', and a note to 'Remove this panel once you're ready to share your space with team members.' Below this is a navigation bar with 'Team', 'Overview', 'Team news', and 'Recently updated' links, and a search bar. At the bottom, there is a 'Team' section with a placeholder for adding team members.

NOTE: As a user, you probably won't need to create spaces. Your Confluence admin or team leader may have one or more spaces set up for you.

EXERCISE

DURATION: 10 minutes

- 1. Open Confluence by going to: <https://www.atlassian.com/software/confluence>**
- 2. You can sign-in with Google**
- 3. Look around the Confluence page!!!**

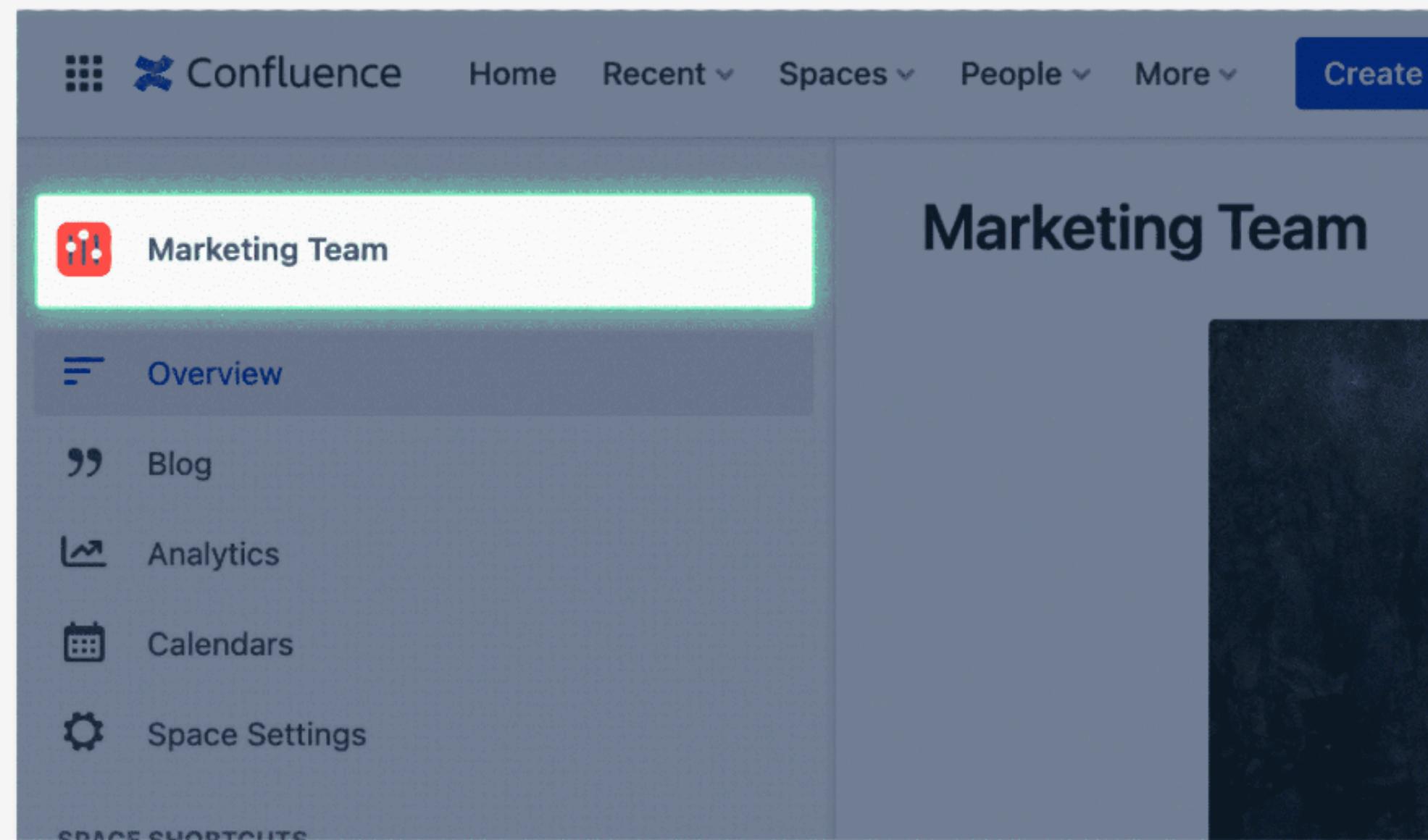
How are your spaces set up?

- **Team space** - This is a space for a specific team, like the marketing team. Using a space for a team helps organize and share pages related only to their work.
- **Project space** - You can organize a space around a particular project, like “Q1 Engagement Campaign.”
- **Documentation space** - You can use a space to create and organize technical documentation for your products or services.
- **Knowledge base space** - Knowledge base spaces store answers to common questions, such as policies and IT solutions. You can share them with customers.
- **Personal space** - This is a space just for you! You can use a personal space to write down ideas, organize notes, keep track of goals, or document anything else you'd

How are your spaces set up?

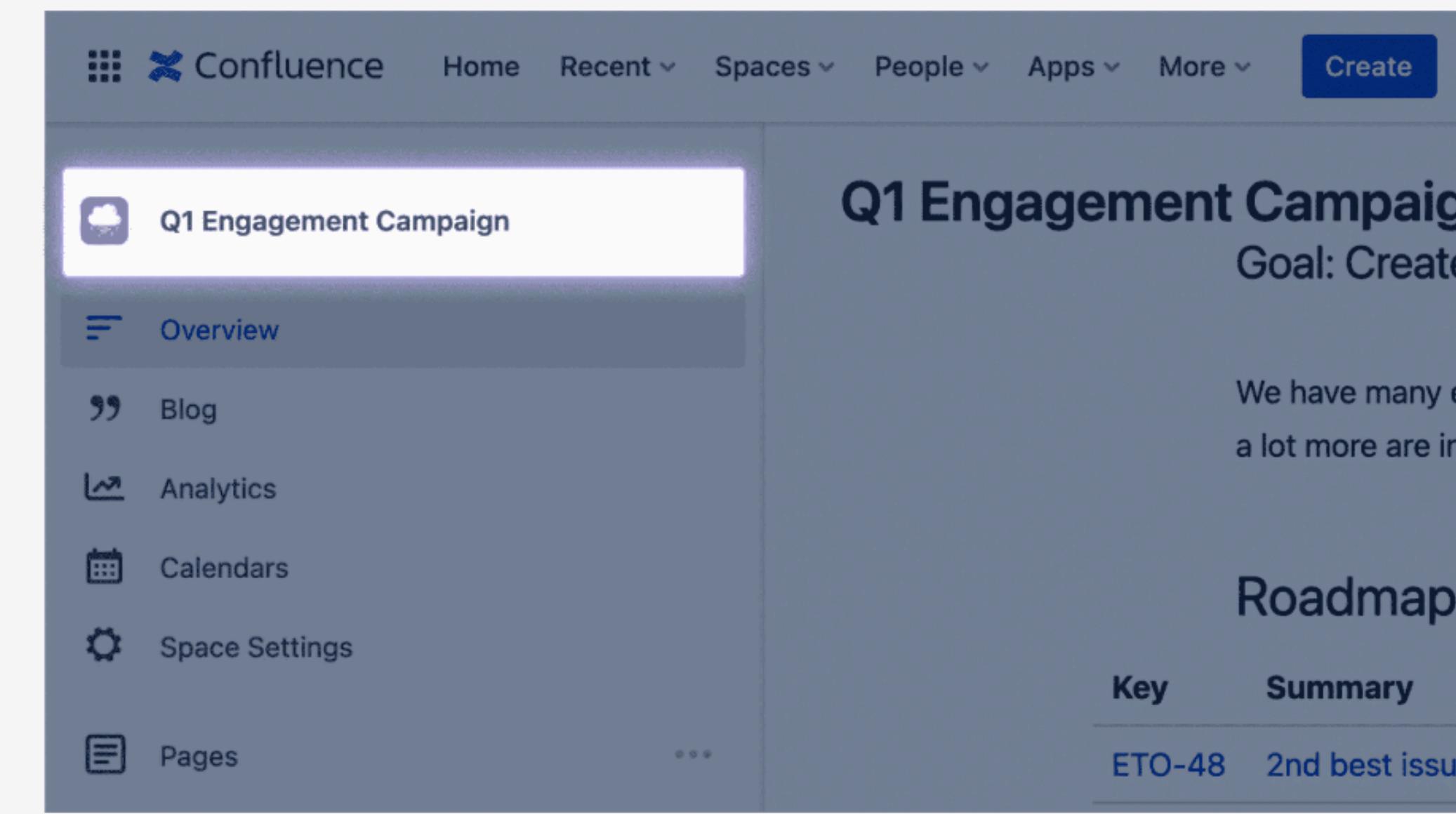
- Take a look at the names of your spaces. This will help you understand how spaces are set up and how your team is structuring the work.

This is a **Team Space**



The screenshot shows the Confluence interface for a 'Marketing Team' space. The top navigation bar includes 'Confluence', 'Home', 'Recent', 'Spaces', 'People', 'More', and a 'Create' button. The left sidebar has 'Marketing Team' selected, with options for 'Overview', 'Blog', 'Analytics', 'Calendars', and 'Space Settings'. The main content area is titled 'Marketing Team' with a large dark image placeholder.

This is a **Project Space**



The screenshot shows the Confluence interface for a 'Q1 Engagement Campaign' space. The top navigation bar includes 'Confluence', 'Home', 'Recent', 'Spaces', 'People', 'Apps', 'More', and a 'Create' button. The left sidebar has 'Q1 Engagement Campaign' selected, with options for 'Overview', 'Blog', 'Analytics', 'Calendars', 'Space Settings', and 'Pages'. The main content area is titled 'Q1 Engagement Campaign' with a sub-section 'Goal: Create' and a 'Roadmap' section. A footer note says 'We have many e...'.

What is a page?

- **Pages are documents you can create in Confluence.**
- They can be filled with text, tables, and multimedia, similar to other digital documents you may have used. Every Confluence page lives online and can be edited in real time with your teammates.
- You can create pages for nearly any purpose: marketing campaigns, HR policies, product requirements, how-to support materials, even personal brainstorming notes. There are no limitations to the types of pages you can create.

HUMAN RESOURCES



Welcome to the team!

Search for anything

Benefits & Perks

Holidays

Medical, Dental, Vision

401K

Talent Acquisition

Recruiting

Onboarding

Referral program

Browse by topic

A-S

benefits

experience

kb-how-to-article

learning

office

policies

printer

recruiting

T-Z

talent

technology

Learning & Development

Performance

Coaching & Mentoring

Self-learning programs

Workplace Experience

Amsterdam

Austin

Sydney

Policies & Programs

Hardware & Software

Systems & Access

Printers

Technology

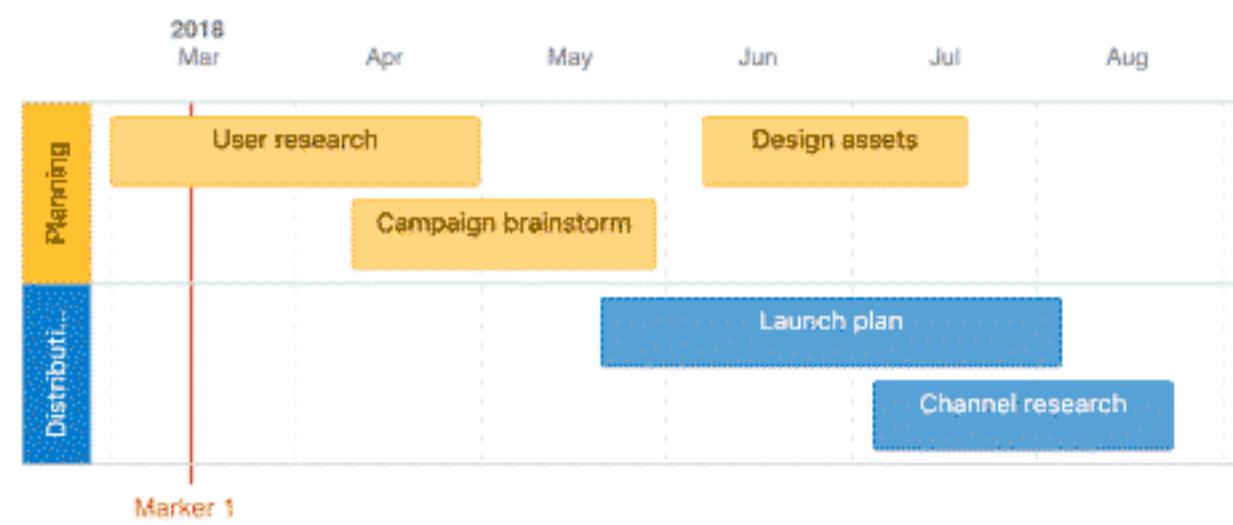
MARKETING

Marketing Campaign

- Objective: Plan and track campaign activities for Q3 2019 📈
- Goals: Increase signups from new market segment by 10% 🌟

Team 🚀	Milestones	Campaign overview
Marketing lead - @Mia	<input checked="" type="checkbox"/> Messaging doc complete 🌟 30 Apr 2019	<ul style="list-style-type: none"> Campaign Activities Goals Target Market Messaging & Positioning Budget H1
Analytics - @Jose	<input type="checkbox"/> Budget plan reviewed 📈 Wed, 01 May	
Design - @Emma	<input type="checkbox"/> Press release drafted 📈 Wed, 12 Jun	
Email - @Harvey		

Campaign Activities



Goals

Goal	Metric
Expanding to new markets	Increase signups by 10%
Target net new paid customers	Increase conversion rates from 12% to ~15% in Q1

ENGINEERING

Product Requirements Doc

Target release	30 Aug 2019
Epic	MD-5 - Search IN DEVELOPMENT
Document status	IN PROGRESS
Designer	@Mia
Tech lead	@Will
QA	@Jose

- Requirements
- Success Metrics
- Primary user story
- User interaction and design
- Questions
- Not Doing

Requirements

	Title	User Story	Jira Issues	Importance	Notes
1	Search field	As a user, I want to be able to click anywhere in the app to search so that I can search anywhere at any time.	MD-1 - Search field CURRENT	MUST HAVE	Should be persistent across all screens with search icon.
2	Search results	As a user, I want to see search results so that I can choose the page I want to see.	MD-2 - Search results CURRENT	MUST HAVE	Results should be ordered by date.
3	Search history	As a user, I want to see a list of previously searched terms so that I can use them as shortcuts for re-searching.	MD-3 - Search history IN DEVELOPMENT	NICE TO H...	Include most recent 5 searches.
4	Search details	As a user, I want to see the title, creator, and space of a search result so that I can be sure I'm selecting the right result.	MD-4 - Search details PROPOSED	NICE TO H...	Can we include a user icon here too?

What's the difference between pages and blog posts?

You can also create blog posts in Confluence. You'll use them for slightly different purposes.

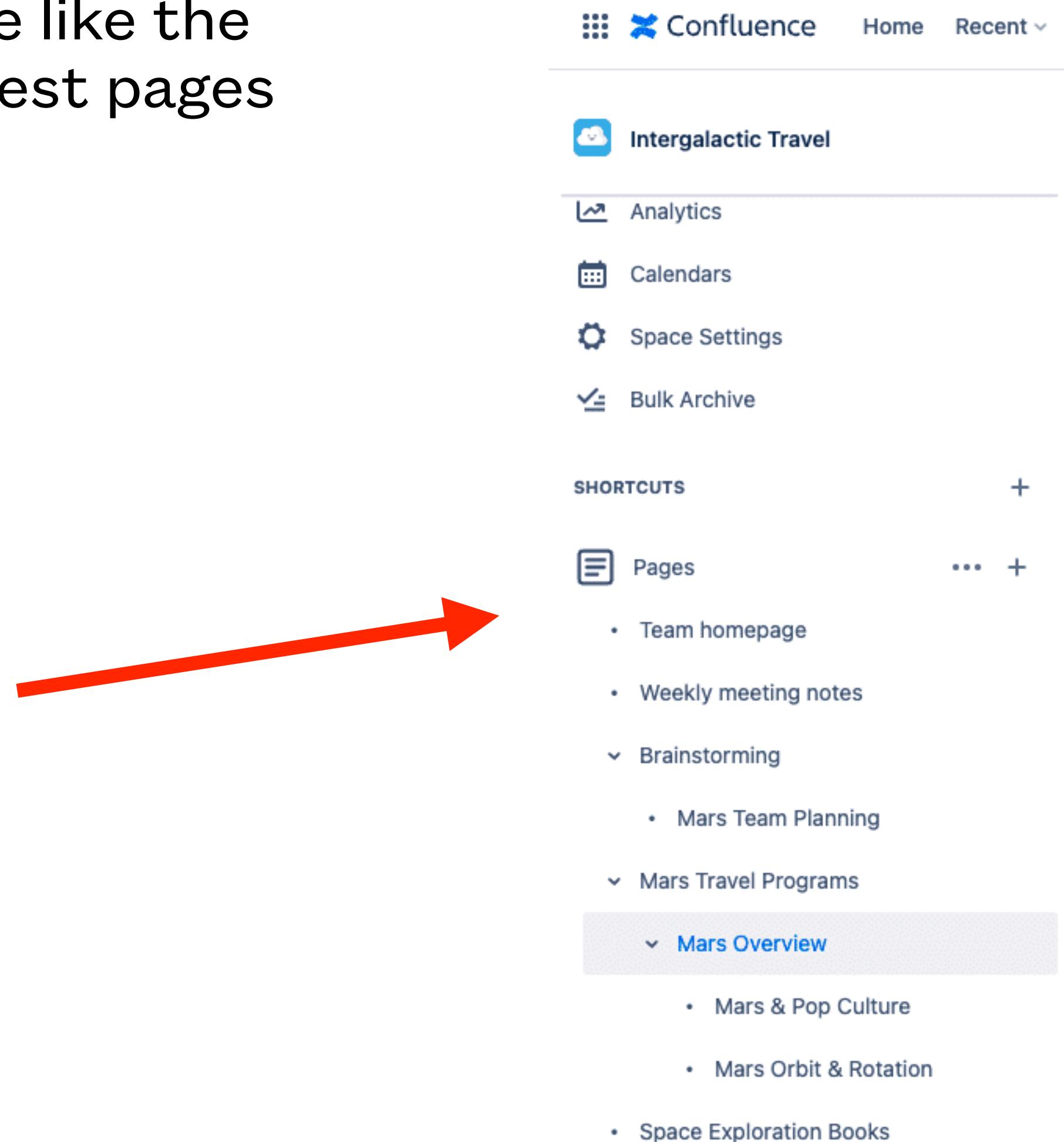
Pages are best for evergreen content, like brainstorms, project plans, and other long-term content across your organization. You can structure pages in a hierarchy. You'll probably use pages more often than blog posts.

Blog posts are best for short-lived content, like sharing timely announcements, updates, and news. They are ordered chronologically, not in a hierarchy. You can access them from the Blog section in the space sidebar.

How do spaces and pages relate to each other?

- In Confluence, a space is like a filing cabinet. Pages are like the folders and documents in the filing cabinet. You can nest pages underneath other pages.

Spaces contain pages that can be nested.



Confluence Home Recent

Intergalactic Travel

Analytics

Calendars

Space Settings

Bulk Archive

SHORTCUTS +

Pages ... +

- Team homepage
- Weekly meeting notes
- ▼ Brainstorming
 - Mars Team Planning
- ▼ Mars Travel Programs
 - ▼ Mars Overview
 - Mars & Pop Culture
 - Mars Orbit & Rotation
 - Space Exploration Books

QUIZ

Which of the following statements about pages is true?

- A. Multiple users can edit pages in Confluence at the same time.
 - B. Spaces are nested under pages.
 - C. You can only store pages in Confluence, not edit them.
 - D. You can't nest pages under other pages.
-

QUIZ ANSWER

Which of the following statements about pages is true?

- A. Multiple users can edit pages in Confluence at the same time.**
- B. Spaces are nested under pages.
- C. You can only store pages in Confluence, not edit them.
- D. You can't nest pages under other pages.

[Confluence is a collaborative place to store and edit pages. Multiple users can edit a page simultaneously. You can nest pages under spaces as well as under other pages.]

QUIZ

True or false? Spaces must be organized by team; you can't create a space for an individual project.

- A. True
 - B. False
-

QUIZ ANSWER

True or false? Spaces must be organized by team; you can't create a space for an individual project.

- A. True
- B. False**

[Your organization can use spaces however you need! Spaces are commonly created for teams, projects, personal work, documentation, knowledge bases, and more.]

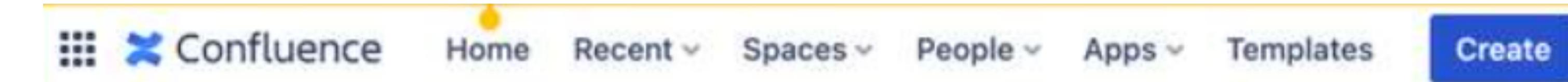
3. Start navigating in Confluence

By the end of this lesson, you'll be able to:

- Move around Confluence using the main navigation bar
 - Understand how pages are nested in a space sidebar
-

Where do you find information in Confluence?

- Let's start with your homepage.
- Your homepage is what appears when you open Confluence. It contains links to and summaries of information in your Confluence site.



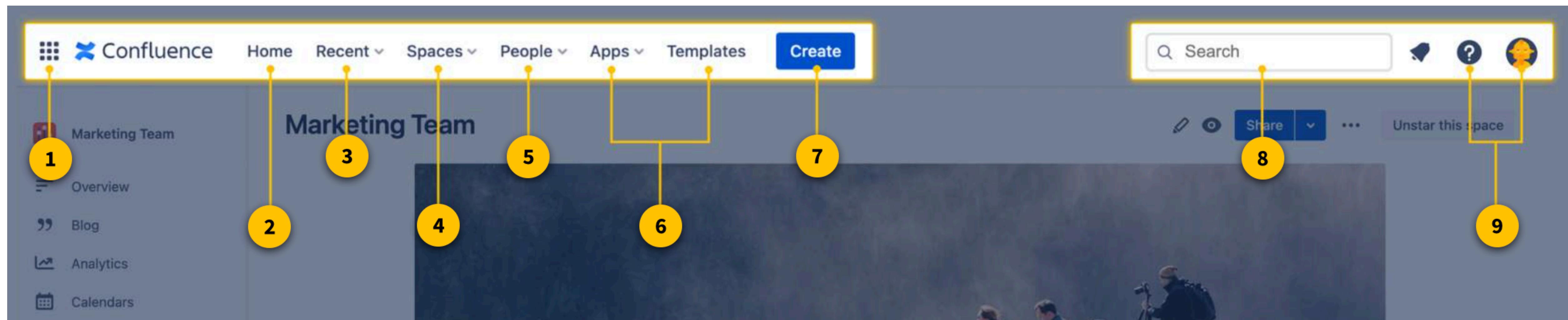
NOTE: The options within your navigation bars may look different than the screens in this course. Navigation options can be customized based on your space settings, permissions, and team preferences.

NOW, LET'S GET AROUND ON CONFLUENCE!

How do you find a space

The main navigation bar helps you move around Confluence.

The **main navigation bar** is at the top of your screen as you move through Confluence. It helps you locate information.

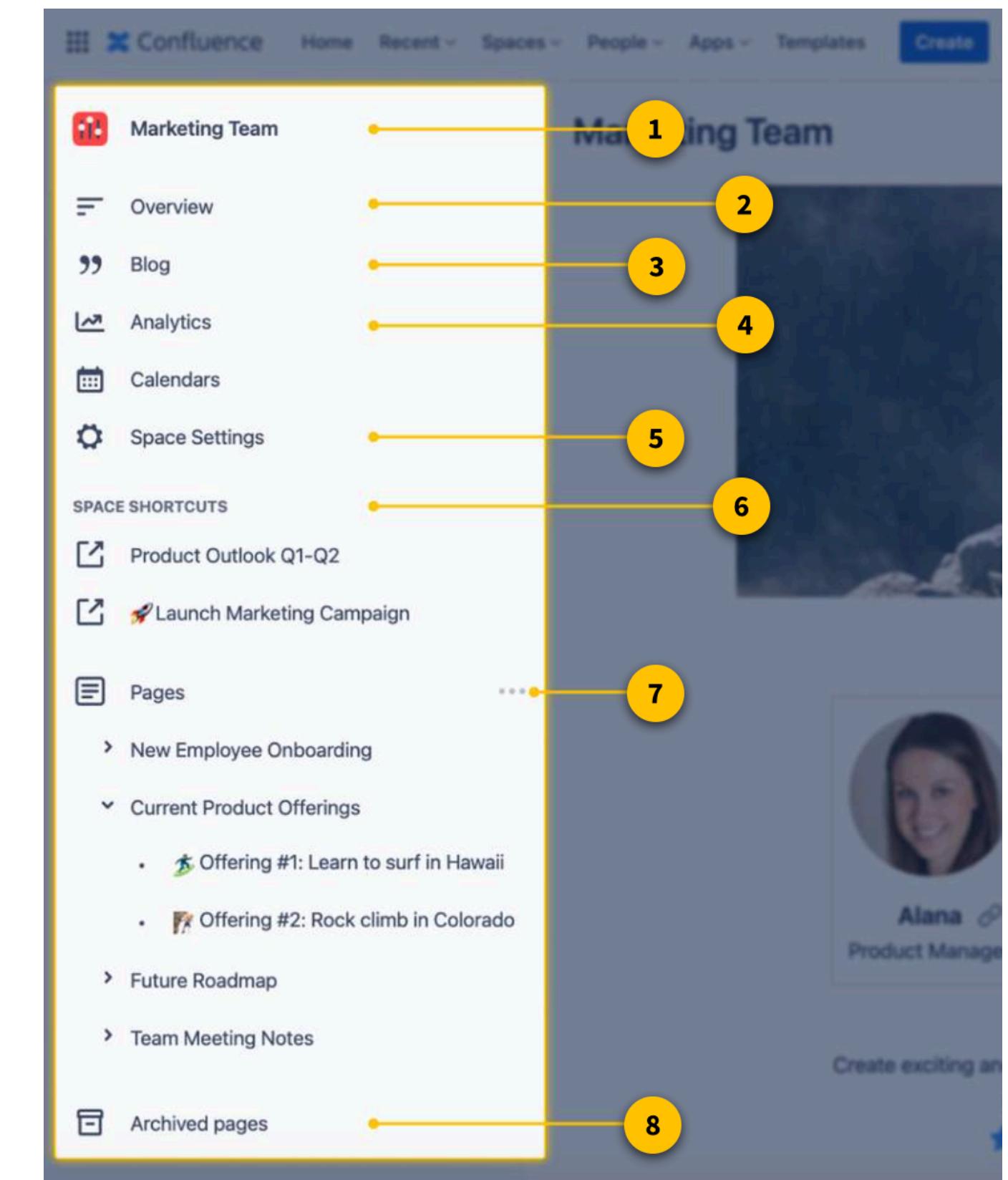


LET'S LOOK AT THE ITEMS SHOWN ABOVE

How do you find pages within a space?

Use the space sidebar to explore what's in a space.

- When you've entered a space, you'll see a collapsible menu on the left of your screen. This is the space sidebar, a menu to guide you around the space.



LET'S LOOK AT THE ITEMS SHOWN ABOVE

QUIZ

Which of the following is not a way to find a page?

- A. Use the page tree
 - B. Use the search bar
 - C. Go to the homepage
 - D. Select the Spaces dropdown
-

QUIZ ANSWER

Which of the following is not a way to find a page?

- A. Use the page tree
- B. Use the search bar
- C. Go to the homepage
- D. Select the Spaces dropdown**

[Selecting the Spaces dropdown shows you a list of spaces, not pages. You can use the page tree, search bar, and homepage to find pages. Note that the homepage will only help you find certain pages.]

QUIZ

What can you see in the feed on your homepage?

- A. Pages you've recently interacted with
 - B. Pages you've starred
 - C. Recently popular pages in your Confluence site
 - D. Spaces you've starred
-

QUIZ ANSWER

What can you see in the feed on your homepage?

- A. Pages you've recently interacted with
- B. Pages you've starred
- C. Recently popular pages in your Confluence site**
- D. Spaces you've starred

[The feed on your homepage shows recently popular pages from your Confluence site.]

SECTION 2

Organizing and communicating your work in Confluence

Learn how to create content quickly and find all the resources you need to do your job. Get to know the Confluence interface so that you can start creating, organizing, and improving your content.

This section will cover:

- 1. Creating and managing pages in Confluence**
- 2. Enhancing pages in Confluence**
- 3. Collaborating on pages in Confluence**
- 4. Searching for pages in Confluence**

1. Creating and managing pages in Confluence

By the end of this lesson, you'll be able to:

- Create a page
 - Browse and select page templates
 - Understand the difference between publishing and updating pages
 - Move a space in a page
 - Understand the difference between archiving and deleting pages
-

Creating pages

There are two ways to create a page.

- You can create a Confluence page using either the Create button or the page tree.

NOTE: Not everyone can create pages in Confluence. Some teams limit page creation to space admins only. If you don't see a **Create** button in your main navigation bar, **you may not be able to create pages.**

EXERCISE

To create a page, from the navigation bar, click Create.

A new blank page will be created and opened in Edit mode.

At the top of the page, the breadcrumb displays the page hierarchy indicating the parent page under which the new page will be created.

The parent page is the page from within which you clicked the Create button.

The right pane of the editor lists the space within which the new page will be created along with various options for creating specific types of pages such as blog posts or pages based on predefined templates.

The new page created in the confluence editor allows you to add and format content. You will learn about adding, formatting, and saving content later in this course.

EXERCISE

You can also create a page from the page tree on the space side bar.

By using a page tree, you can structure the pages in a specific hierarchy by identifying existing pages as parent pages and creating new pages as their child pages.

To create a page from a page tree, on the space sidebar, under the Pages section, identify the page or section under which you want to create a new page.

Now when you hover the mouse pointer over the identified location, you will see the Create a child page icon or the plus icon adjacent to the page.

For this demo, let's create a blank page under the first section listed under Pages on the sidebar.

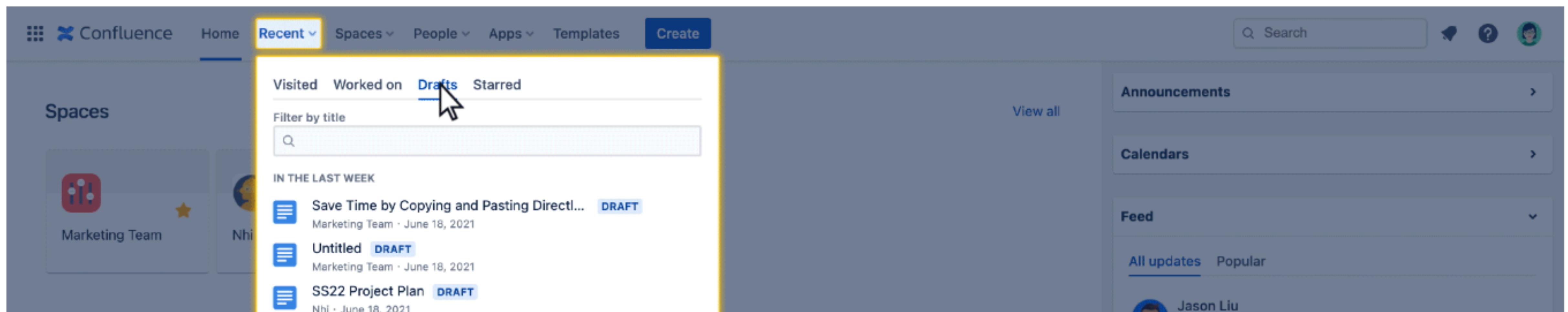
Click the, Create a child page icon adjacent to the section name.

A blank page will be opened in the Confluence editor.

Tips for creating pages

You don't need to save work manually - As you edit your page, Confluence saves your work automatically. Every page is saved as a draft that only you and your collaborators can see. Even if you close the page, your draft will be saved.

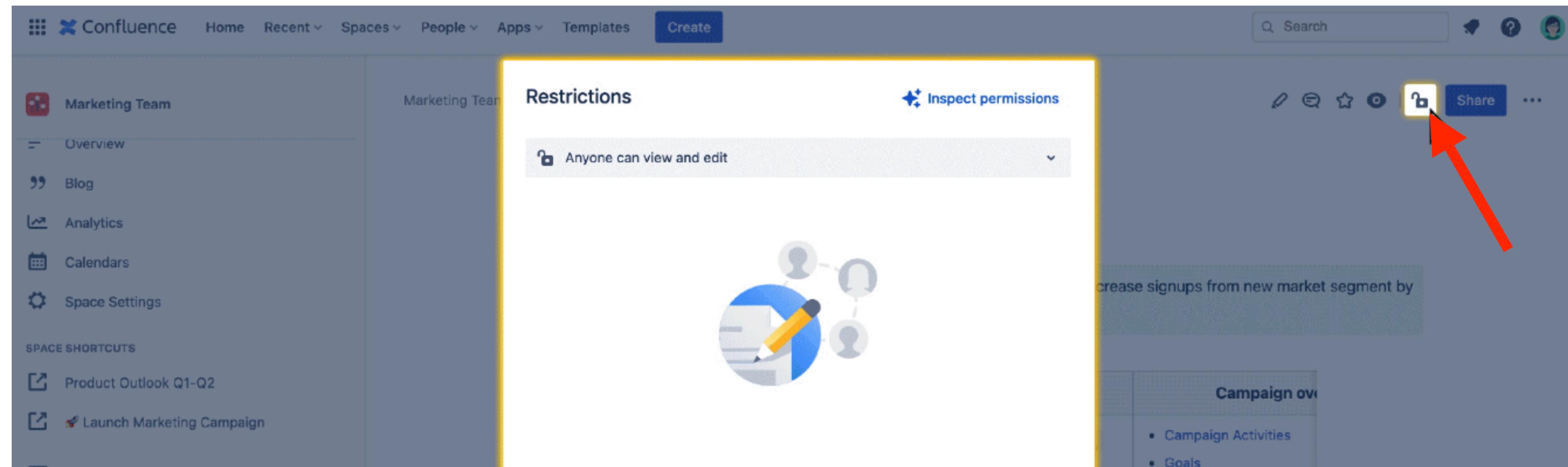
You can find your saved drafts in the main navigation bar by selecting Recent and toggling to Drafts.



You can find your saved drafts in the main navigation bar - Notice the lock icon near the top right of your screen. This is how you update page permission settings. You decide who can and cannot see your page.

By default, your page will be set to 'Anyone can view and edit.' Confluence is designed for transparency so everyone can access the information they need. That said, you may have control over these settings, depending on your own permissions.

Sometimes you'll want your entire organization to be able to view your page. Other times you'll want a private page only you can view.



Using page templates

Page templates help you save time and get inspired.

- When you create a new page, you can start from a blank page or a page template. **Page templates** are pre-formatted pages that include guided instructions. They provide a starting place to save you time and keep your content well-organized. Confluence has over 75 templates for you to choose from.
- **To use a template**, first create a new page. A panel will open on the right side of your screen. This panel provides a list of templates for you to browse.

NOTE: You can only use page templates when creating a brand new page. You can't add a template to a page you've already published or added content to.

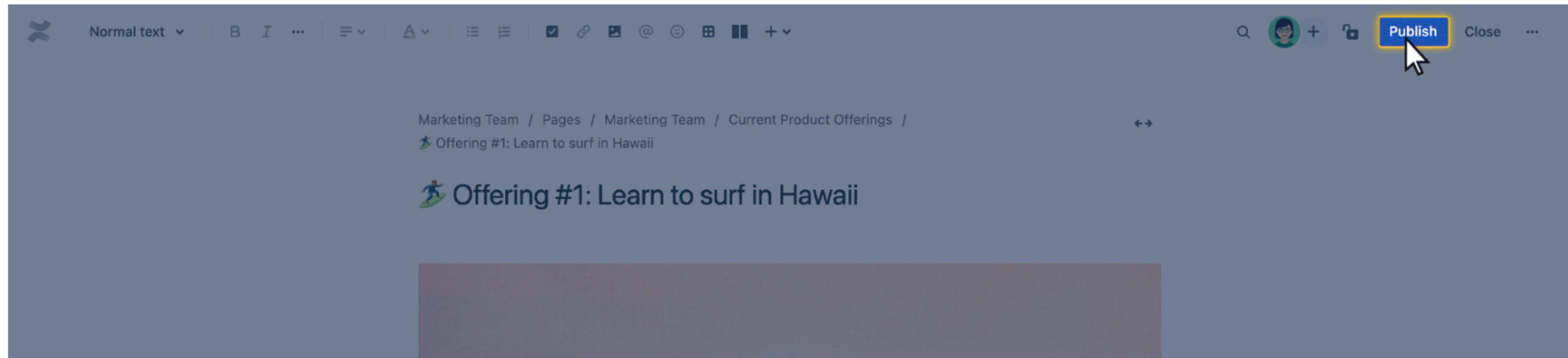
EXERCISE

- 1. Type in the search box to find a template that fits your needs**
- 2. Select the category bubbles to filter quickly**
- 3. Hover your cursor over a template to see a preview**

Publishing pages

When your content is ready, it's time to publish!

You must click the Publish button for your page to be viewable by your team. When you click Publish, the page will reload, and you'll see the published version of your page.



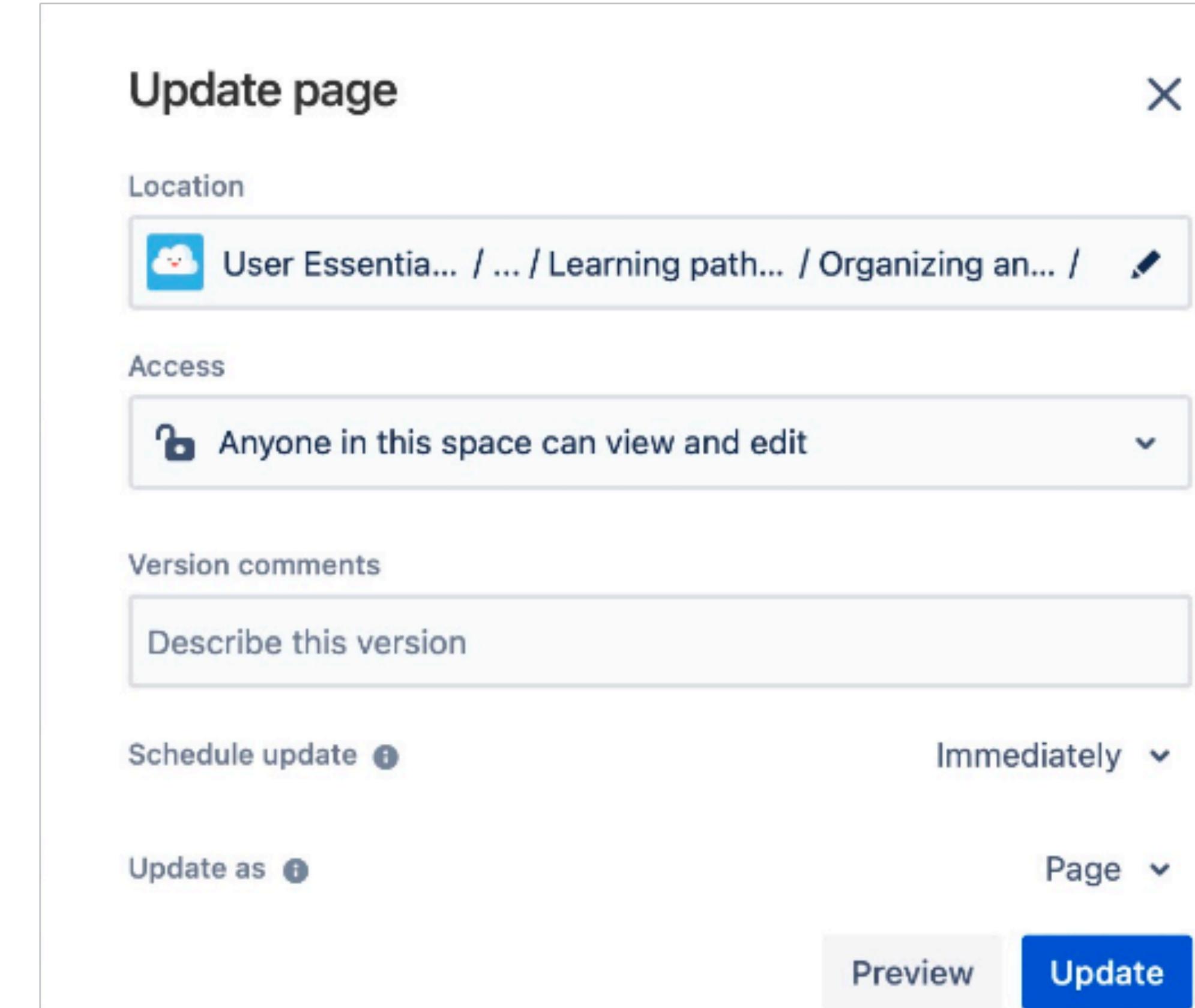
Once your page is published, you can still edit it.

Confluence pages are meant to be iterative, collaborative, and flexible. If you edit a published page, you can update the page to share a new version.

You have some options when publishing and updating.

If you click the dropdown next to the **Publish** or **Update** button, you'll see several options. You can change:

- **Where** the page will be published or updated
- **Who** can view and edit the page
- If there's a **version comment**
- **When** the page will be published or updated
- If the content is a **page** or a **blog post**

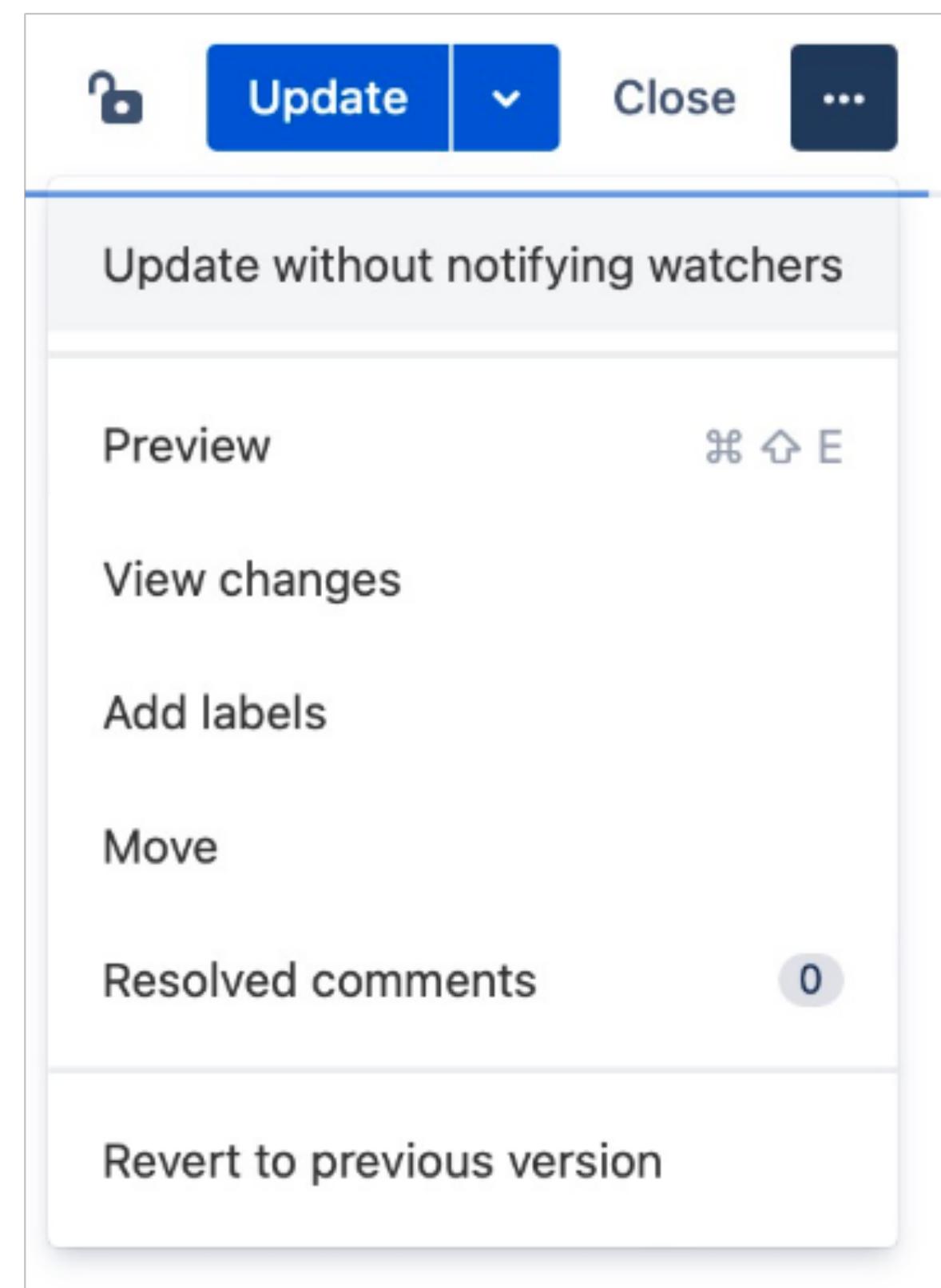


You can also update a page without notifying watchers. While you may want users watching a page to get a notification of significant changes, you may not need to send a notification when you correct a typo or update a couple sentences.

It's recommend you use this updating option often to make sure your colleagues only receive notifications for important changes.

To update without notifying watchers:

1. While in edit mode, click the **More actions** icon (represented by **•••**).
2. Select **Update without notifying watchers**.

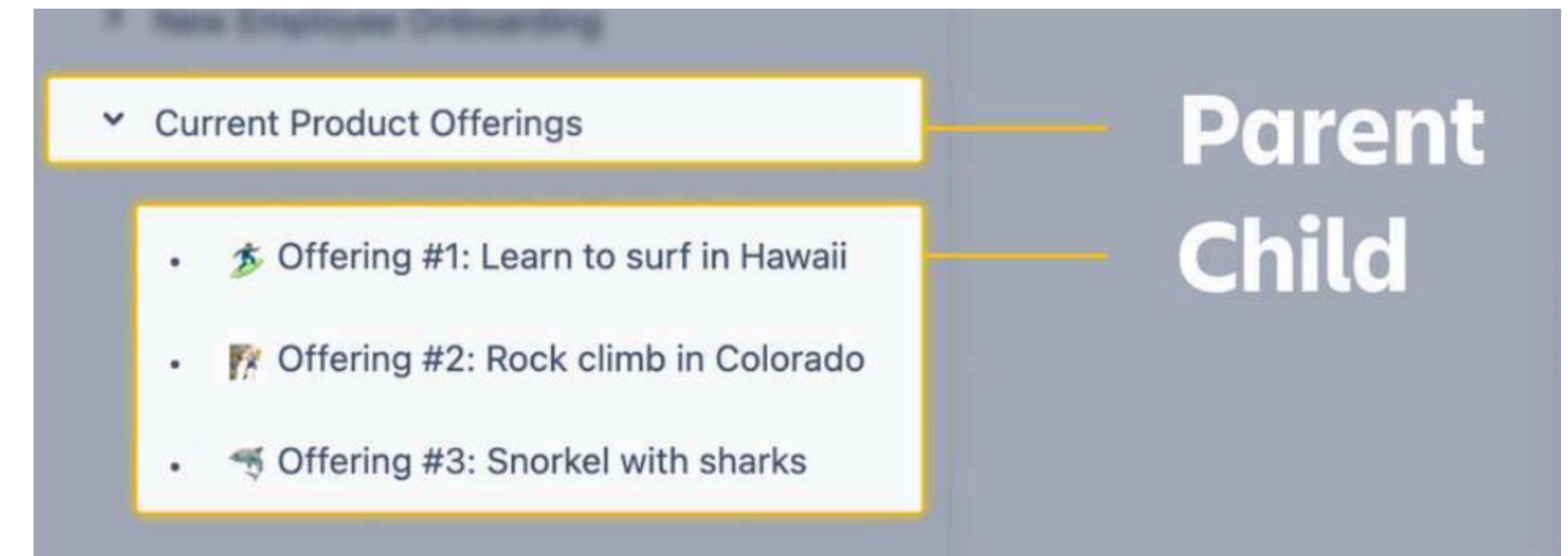


Moving pages

Want to group several pages together?

- As you create more pages, you may find your space getting cluttered. To reduce clutter, you can use parent and child pages to create an organized system.
- **Parent pages** determine the category, like folders, though they can also contain their own, helpful information. **Child pages** sit within parent pages. You can have several levels of parent and child pages.

NOTE: Any page can be a parent page. Parent pages just have other pages nested underneath them. They can be pages with content or blank pages used simply to organize the page tree.



EXERCISE

How to move a page?

To change how your pages are organized:

- 1. Expand the space sidebar and locate the page tree.**
- 2. Click the arrows to expand and find a page you'd like to move.**
- 3. Drag and drop the page to a new position in the page tree.**

Note: If you move a parent page, **all of its child pages move, too.**

Deleting and archiving pages

What if you no longer need a page?

- If you don't need a page anymore, you have two options.
- You can **archive** the page, which removes it from your page tree and search, then stores it in an Archived section. You should archive most pages you don't need to easily preserve the information in them, but keep your space tidy.
- You can also **delete** pages that you don't need, which sends them to the Trash in Space settings. Deleted pages can be restored from the trash, but only by the space admin. They can also be purged from the trash, which deletes them permanently.
- To archive or delete a page, click **More actions** (represented by ). You should see both options.

QUIZ

What is the difference between publishing and updating a page?

- A. Publishing a page makes it public to all users in Confluence; updating a page makes it live to only a specific group of users.
- B. Publishing a page notifies watchers; updating a page doesn't notify watchers.
- C. You can only publish parent pages; you update child pages.
- D. You publish pages the first time; you update pages every time you edit them after they've been published.

QUIZ ANSWER

What is the difference between publishing and updating a page?

- A. Publishing a page makes it public to all users in Confluence; updating a page makes it live to only a specific group of users.
- B. Publishing a page notifies watchers; updating a page doesn't notify watchers.
- C. You can only publish parent pages; you update child pages.
- D. You publish pages the first time; you update pages every time you edit them after they've been published.**

[In Confluence, you publish a page the first time you make it live. After that, whenever you edit the page, if you make your edits live, that's called updating.]

Publishing and updating have no impact on who can view the page, who is notified, or where the page sits in the page tree. Those are other changes you can make while publishing or updating, but don't have to.]

QUIZ

True or false? Any page can be a parent page.

- A. True
 - B. False
-

QUIZ ANSWER

True or false? Any page can be a parent page.

- A. True
- B. False

[Any page can be a parent page, whether it is a page full of content or a blank page only used for organization.]

QUIZ

What are archived and deleted pages stored?

- A. Archived pages and deleted pages are both stored in space settings.
 - B. Archived pages and deleted pages are both stored in the page tree.
 - C. Archived pages are stored in a section of the page tree; deleted pages are stored in a section of space settings.
 - D. Archived pages are stored in a section of space settings. Deleted pages are stored in the section of the page tree.
-

QUIZ ANSWER

Where are archived and deleted pages stored?

- A. Archived pages and deleted pages are both stored in space settings.
- B. Archived pages and deleted pages are both stored in the page tree.
- C. Archived pages are stored in a section of the page tree; deleted pages are stored in a section of space settings.**
- D. Archived pages are stored in a section of space settings. Deleted pages are stored in the section of the page tree.

[Archived pages are stored in the Archived section at the bottom of a page tree. Deleted pages are stored in the trash in space settings.]

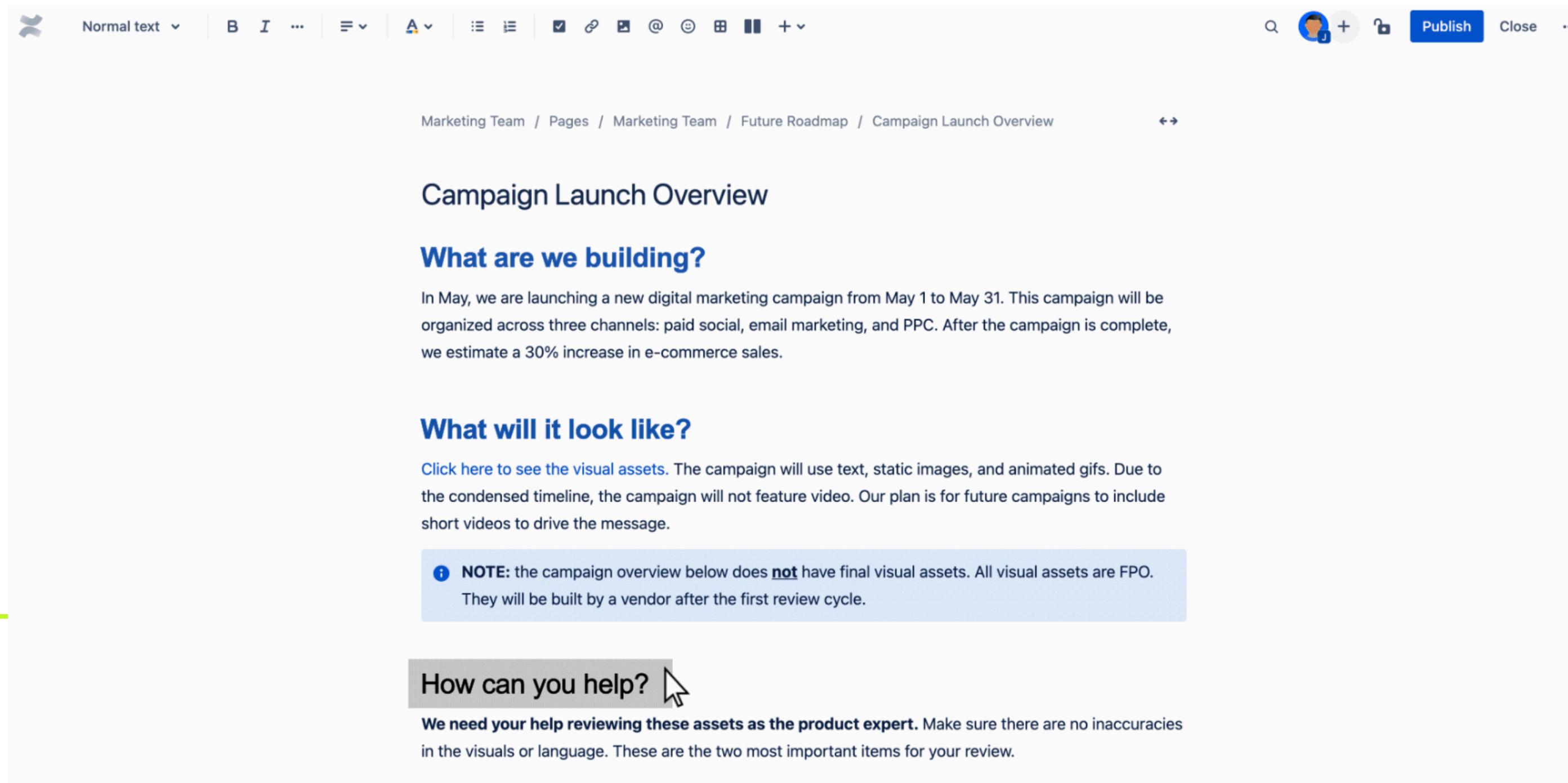
2. Enhancing pages in Confluence

By the end of this lesson, you'll be able to:

- Format text on a page
- Browse and select macros
- Add images and videos to a page

Formatting text

- Confluence helps you express and emphasize your ideas.
- Formatting text is a simple way to clarify your message and call attention to important information. In edit mode, the **toolbar** is at the top of your screen. The left side of the toolbar provides text formatting options.
- Use the text styles dropdown to select various heading and paragraph styles. Add emphasis to text with options such as bold, italics, underline, text alignment, and color.



The screenshot shows the Confluence editor interface with the following details:

- Toolbar:** At the top, there is a toolbar with various text formatting icons (bold, italic, underline, etc.) and a dropdown menu labeled "Normal text".
- Page Header:** The page header shows the breadcrumb navigation: Marketing Team / Pages / Marketing Team / Future Roadmap / Campaign Launch Overview.
- Page Title:** The page title is "Campaign Launch Overview".
- Section Headers:** The page contains two main sections: "What are we building?" and "What will it look like?".
- Text Content:** The "What are we building?" section contains a paragraph about a digital marketing campaign from May 1 to May 31, organized across three channels: paid social, email marketing, and PPC. It mentions a 30% increase in e-commerce sales.
- Text Content:** The "What will it look like?" section contains a note about visual assets, stating that the campaign will use text, static images, and animated gifs, but not video. It mentions that visual assets are FPO and will be built by a vendor after the first review cycle.
- Call-to-Action:** At the bottom, there is a button labeled "How can you help? 
- Page Footer:** The footer contains a note: "We need your help reviewing these assets as the product expert. Make sure there are no inaccuracies in the visuals or language. These are the two most important items for your review."

Using macros

Macros power dynamic pages.

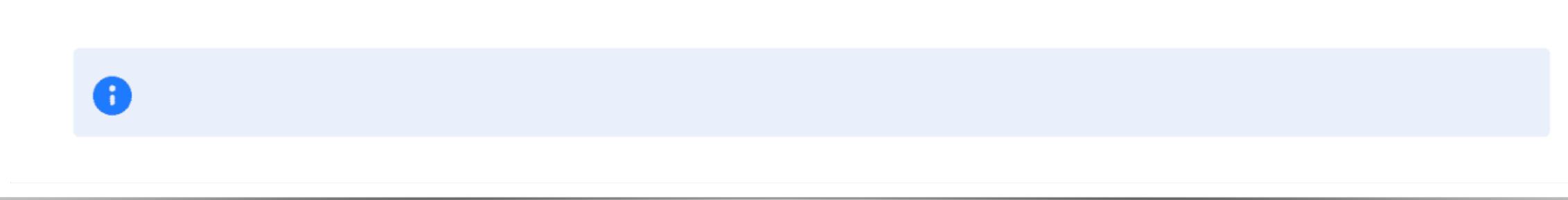
- A **macro** is a tool that extends the capabilities of a Confluence page. They allow you to add extra functionality or include dynamic content on your page. You can even use macros to display information from other applications in Confluence, like Jira Software.
- To add a macro:
- Make sure your page is in edit mode.
- On the toolbar, select the **+** dropdown.
- Select one of the macros to add to your page.

NOTE: Another quick way to add a macro is to type / in the body of your page. This will open a list of available macros for you to choose from.

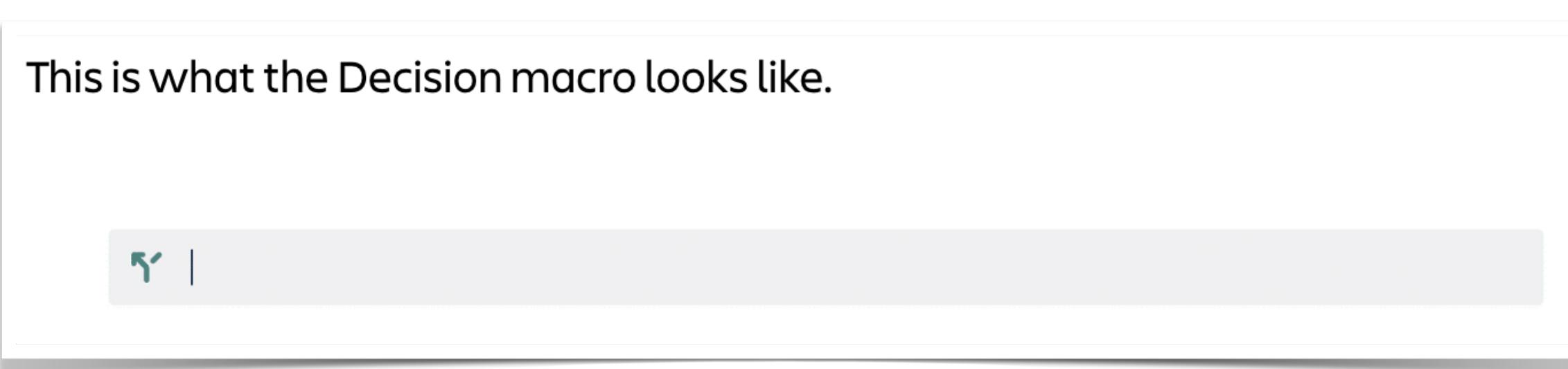
LET'S TRY!

Some popular macros

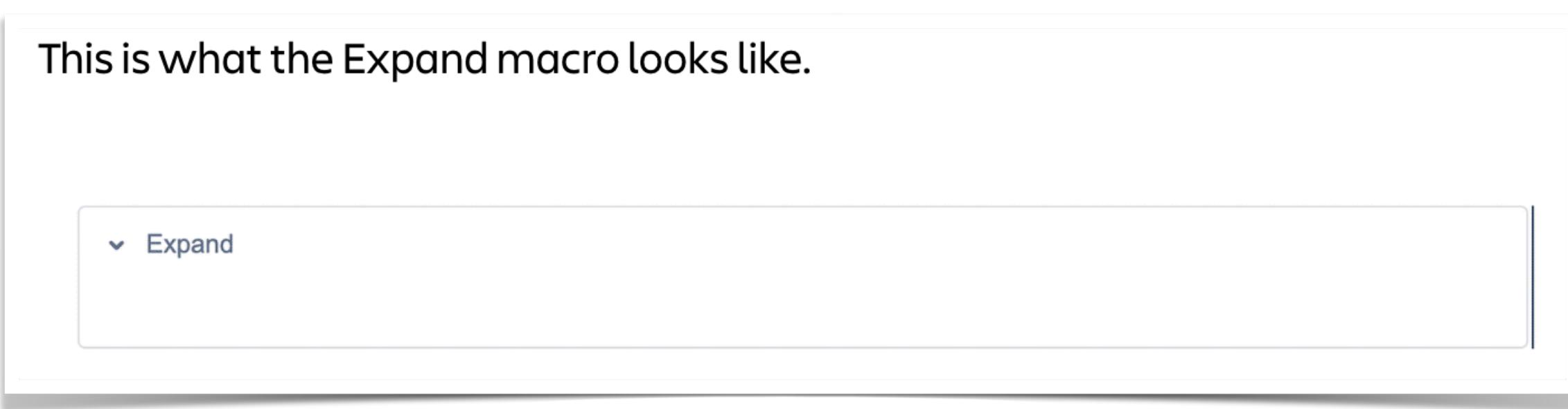
This is what the Info panel macro looks like.



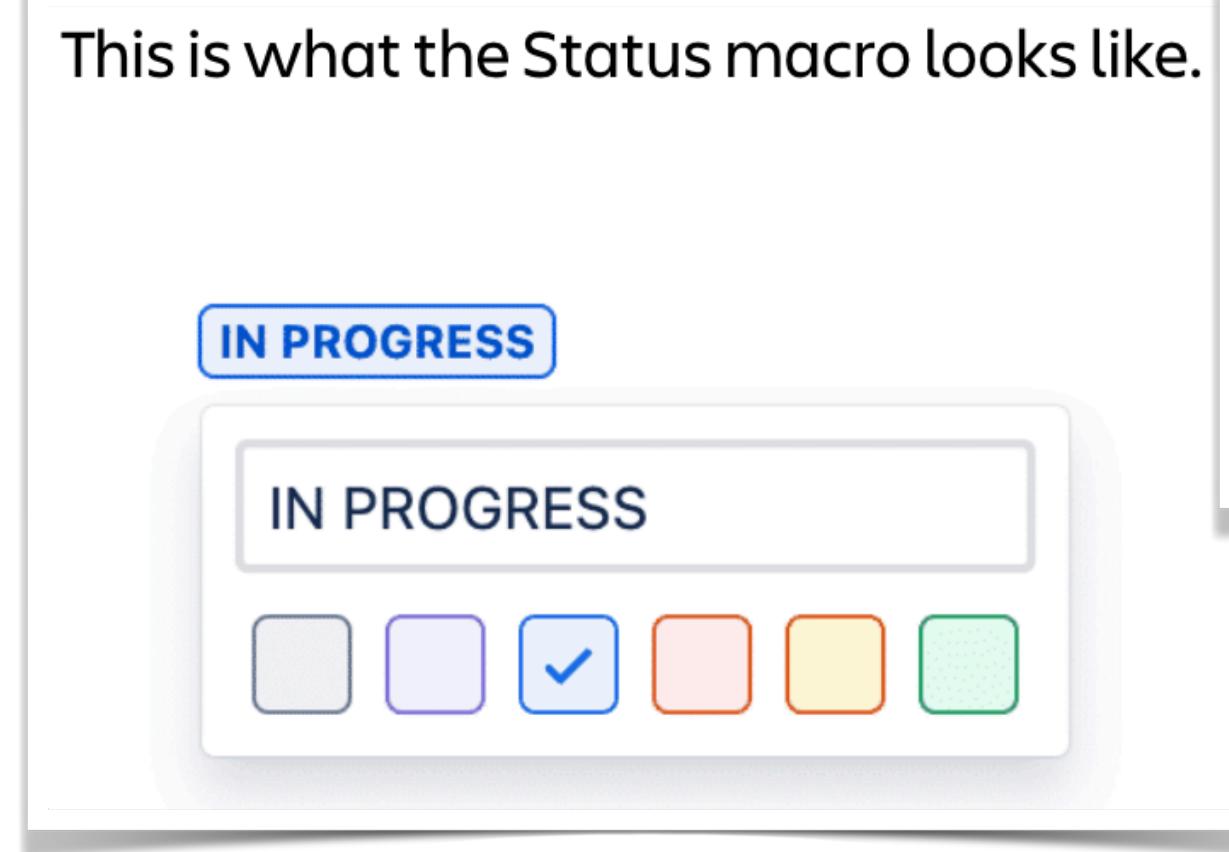
This is what the Decision macro looks like.



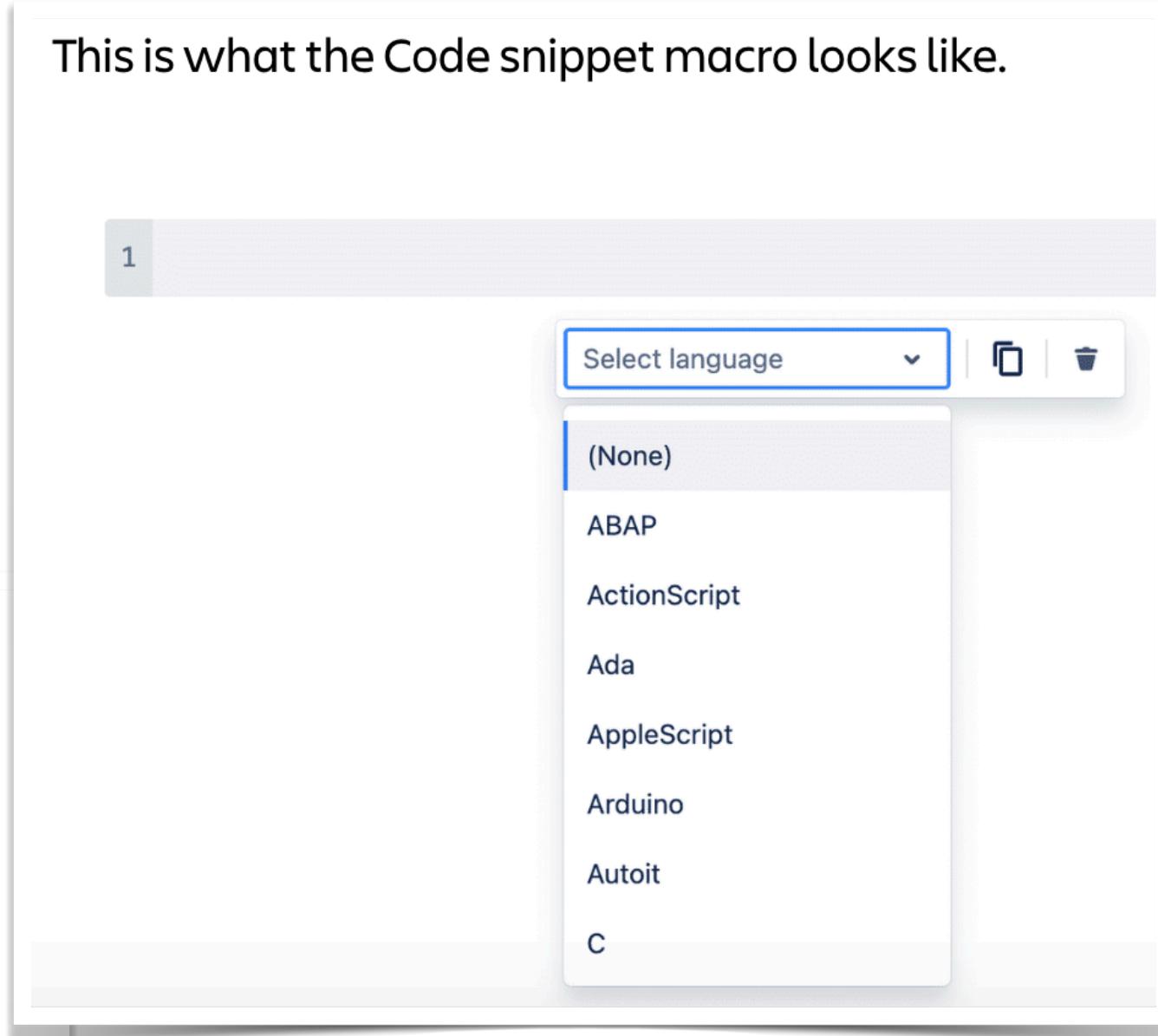
This is what the Expand macro looks like.



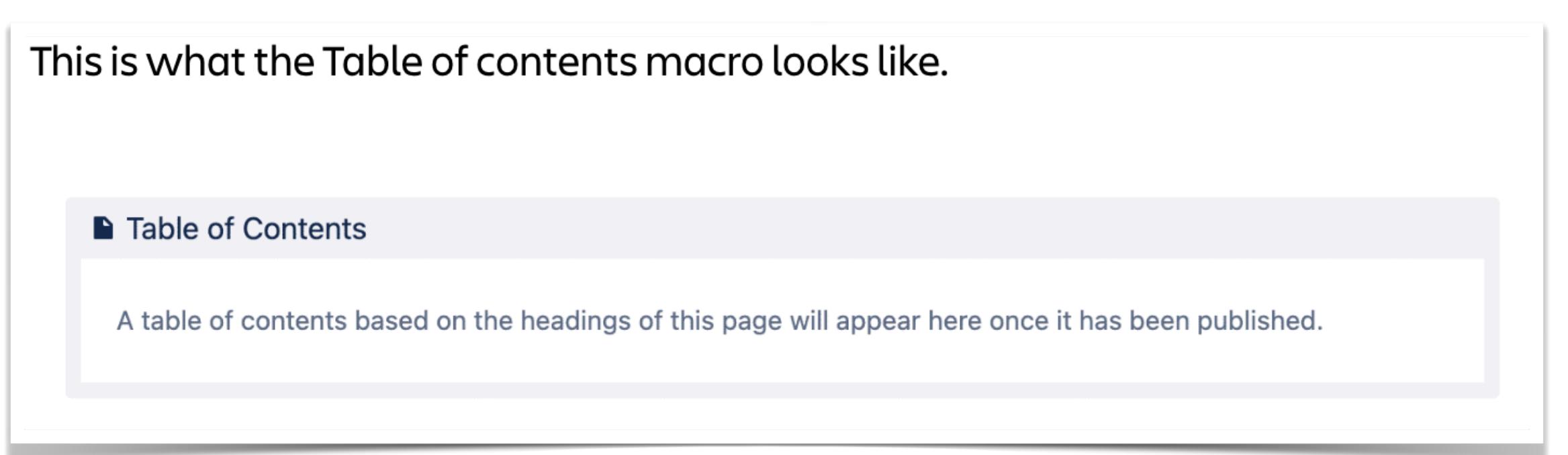
This is what the Status macro looks like.



This is what the Code snippet macro looks like.



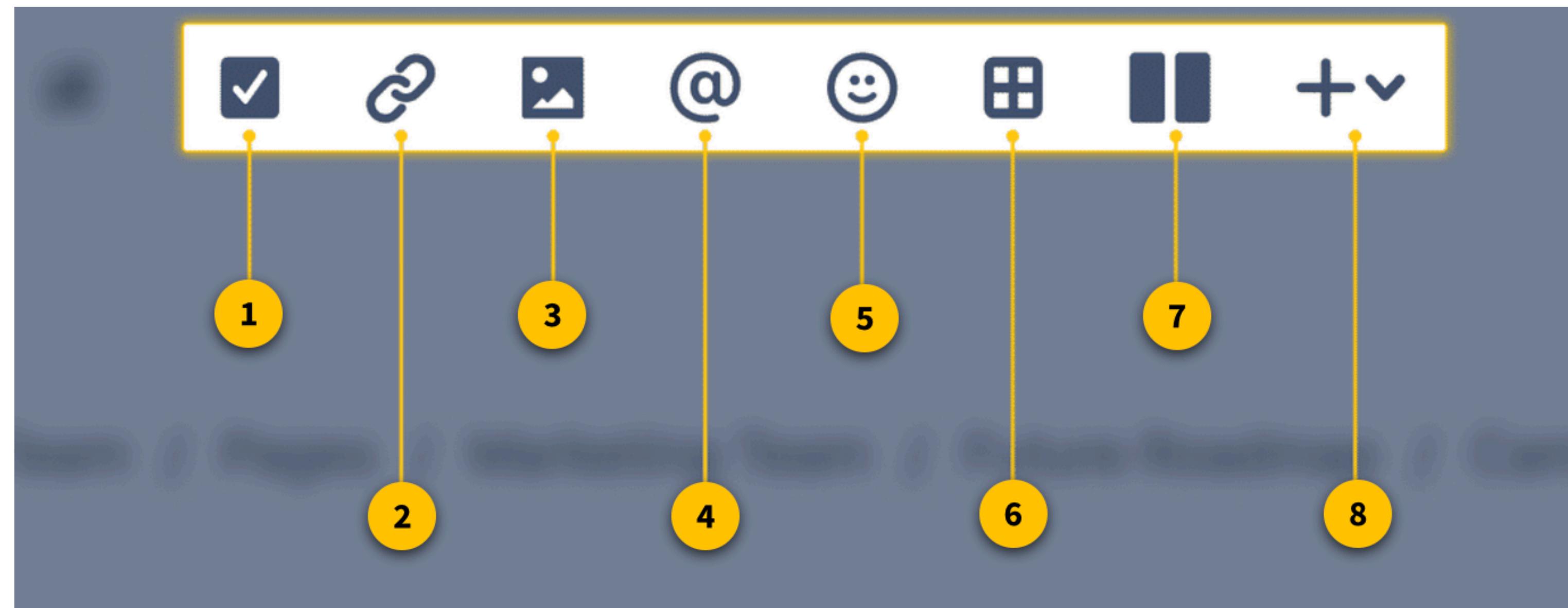
This is what the Table of contents macro looks like.



Other formatting tools

The toolbar has more than text and macros.

- On the right side of the toolbar, there are additional options to improve your page. Here you can add action items, links, multimedia, @mentions, emojis, tables, and layouts.



Formatting tools explained.

1. Use **action items** to assign work to teammates. When you mention a teammate next to the action item, that item will be assigned to them.
2. To **add a link**, select a line of text on the page. Then, click this link icon in your toolbar. Paste the URL you'd like to link.
3. Upload **multimedia** to your page, like images and videos.
4. **Mention teammates** to notify them about your page. To mention a teammate, click this @ icon and type a teammate's name. When your page is published, your teammate will receive a notification.
5. Add an **emoji** to give your page extra style. Select this icon to choose from a list of emojis. You also have the ability to upload your own.
6. Add a 3x3 **table** to your page. You can add or remove columns and rows as needed.
7. Select between a few different column **layouts** for your page.
8. Add a **macro**.

QUIZ

What can macros do in Confluence? (Select two correct answers.)

- A. Bold and underline your text.
- B. Create tables with adjustable columns and rows.
- C. Create a table of contents for the page.
- D. Show data from a connected Jira Software site.

QUIZ ANSWER

What can macros do in Confluence? (Select two correct answers.)

- A. Bold and underline your text.
- B. Create tables with adjustable columns and rows.
- C. Create a table of contents for the page.**
- D. Show data from a connected Jira Software site.**

[While you can bold and underline text as well as create tables in Confluence, macros are more complex components that extend the functionality of your page. For example, macros can generate a table of contents for a page and show data from a connected Jira Software site.]

QUIZ

What symbol is the shortcut that lets you add macros to a page?

- A. /
 - B. ?
 - C. :
 - D. +
-

QUIZ ANSWER

What symbol is the shortcut that lets you add macros to a page?

- A. /
- B. ?
- C. :
- D. +

[Typing / while editing a Confluence page pulls up a list of macros you can choose from. You can also continue typing to search for a specific macro.]

3. Collaborating on pages in Confluence

By the end of this lesson, you'll be able to:

- Use comments to communicate
 - Share pages
 - Export pages for external stakeholders
-

Using comments and mentions

How do comments and mentions help you at work?

Comments and mentions are powerful features to collaborate with teammates. You'll use both features often to give feedback, ask questions, and bring your entire team into the conversation.

Why should you use comments and mentions?

- ✓ **They save you time and make you more efficient.** Comments allow you and your team to work asynchronously, limiting back-and-forth emails and unnecessary meetings.
- ✓ **They help you gain new perspectives and ideas.** With comments, more teammates can get involved in brainstorming and ideating. These fresh perspectives give projects the best chance for success.
- ✓ **They create a culture of openness and support.** Using comments provides transparency and openness across your team.

Different kind of comments & mentions

PAGE COMMENTS

One way to use comments is to add a comment to an entire page. Here's how:

1. Scroll to the bottom of the page.
2. Type a comment in the comment field.
3. Select **Save**.

When you comment on a page, you will automatically start 'watching' that page. That means you'll receive email notifications when others add comments or changes to the page are made. Your teammates can reply to or 'like' your page comments. If they do, you'll be notified.

LET'S TRY!

INLINE COMMENTS

You can also add comments within the page, inline on any text. Inline comments can be added when you are either editing or viewing a page. Here's how to add an inline comment:

1. Highlight the text you'd like to comment on.
2. Click the **comment icon** that appears above the highlighted text.
3. Type your comment and select **Save**.

After you save your comment, the text on the page will be highlighted in yellow. To view comments, click any yellow highlighted text on the page. Just like page comments, your teammates can reply to or 'like' your inline comments.

LET'S TRY!

MENTIONS

Mentioning teammates helps bring attention to important information. You can mention teammates **on a page** or **in a comment**.

When you mention a teammate, they will receive an email notification with a link to the page.

While editing a page or typing a comment, type @, then start typing your teammate's name. When they appear in the list, select them.

LET'S TRY!

NOTE: Comments won't appear to viewers until the page is published. Any teammate mentioned in a comment won't be notified until you publish the page.

Sharing pages

How can you notify someone about a page without mentioning them?

You'll often need to send pages to teams or individuals. The **Share** button at the top right gives you two easy ways to share a page:

1. Enter a teammate's name or email. Type a quick message. Select **Send**.
2. Select **Copy link** to copy the URL. Paste the URL in an email or messaging app to share with teammates.

EXERCISE

- 1. Use the Share option and Confluence to email individuals or teams in Confluence a link to your page or blog post.**
- 3. This is a great way to invite your team to collaborate or to share information with a large group of people.**
- 5. For example, you can send an email to your team member with a message saying, "Hey Alana, could you please review this document by Wednesday?"**
- 7. A page with view restrictions will not automatically give you access to the page.**
- 9. Before sharing, check the page's permission settings to ensure the person you're sharing with has access.**

Exporting pages

How can you share a page outside of Confluence?

You may need to share documentation from Confluence with someone who can't access it, like vendors or consultants outside of your organization. You can export any Confluence page to Microsoft Word or PDF. To export a page:

LET'S TRY!

On any published page, select **More actions** (represented by ).

Hover over **Export** and click **Export to Word** or **Export to PDF**.

NOTE: If exporting to Word, the Word document will download automatically once clicked. The PDF may take a moment to process and require you to select **Download PDF**.

QUIZ

While editing his page, Jeevan added an inline comment mentioning his coworker, Marion. Marion says she can see the page, but can't see Jeevan's comment. What might have happened?

- A. Jeevan hasn't published or updated the page since commenting, so the comment isn't on the live page.
- B. Jeevan can't use mentions within an inline comment, you can only use mentions in page comments.
- C. Marion doesn't have access to view the page, so she can't view the comment.
- D. Marion isn't a watcher of the page, so she can't see comments on it.

QUIZ ANSWER

While editing his page, Jeevan added an inline comment mentioning his coworker, Marion. Marion says she can see the page, but can't see Jeevan's comment. What might have happened?

- A. Jeevan hasn't published or updated the page since commenting, so the comment isn't on the live page.**
- B. Jeevan can't use mentions within an inline comment, you can only use mentions in page comments.
- C. Marion doesn't have access to view the page, so she can't view the comment.
- D. Marion isn't a watcher of the page, so she can't see comments on it.

[If you add an inline comment to a page, you have to publish or update the page for other users to see it. If the page is still being editing, or is a draft, the comments won't appear to viewers.]

You can use mentions in inline comments, page comments, and within page text. Marion said she can view the page, so she can also view any published comments. And whether Marion is watching the page or not, she is able to see any published comments.]

QUIZ

True or false? There is no way to share Confluence content with people who don't have access to your Confluence site.

- A. True
 - B. False
-

QUIZ ANSWER

True or false? There is no way to share Confluence content with people who don't have access to your Confluence site.

- A. True
- B. False**

[While users without Confluence access can't see content within the Confluence site, you can export a Confluence page to PDF or Microsoft Word and share it with them externally.]

4. Searching for pages in Confluence

By the end of this lesson, you'll be able to:

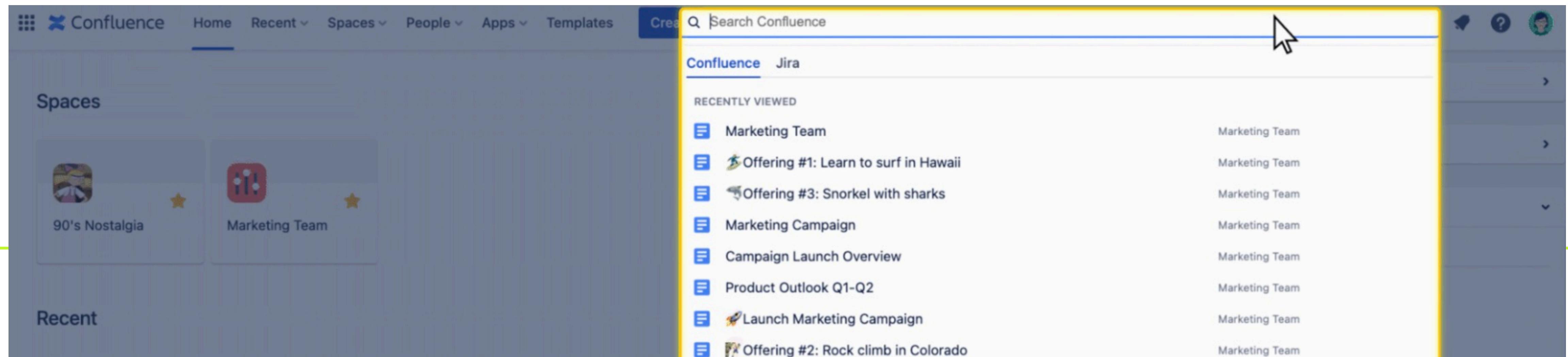
- Use basic and advanced search to find pages and spaces
 - Star frequently used pages to easily access them
 - Locate recently viewed and edited pages
-

How do you find pages in Confluence

We've got a search bar for that.

Another way to find pages is to use the search bar near the top right of the main navigation bar. Here are some tips for using it:

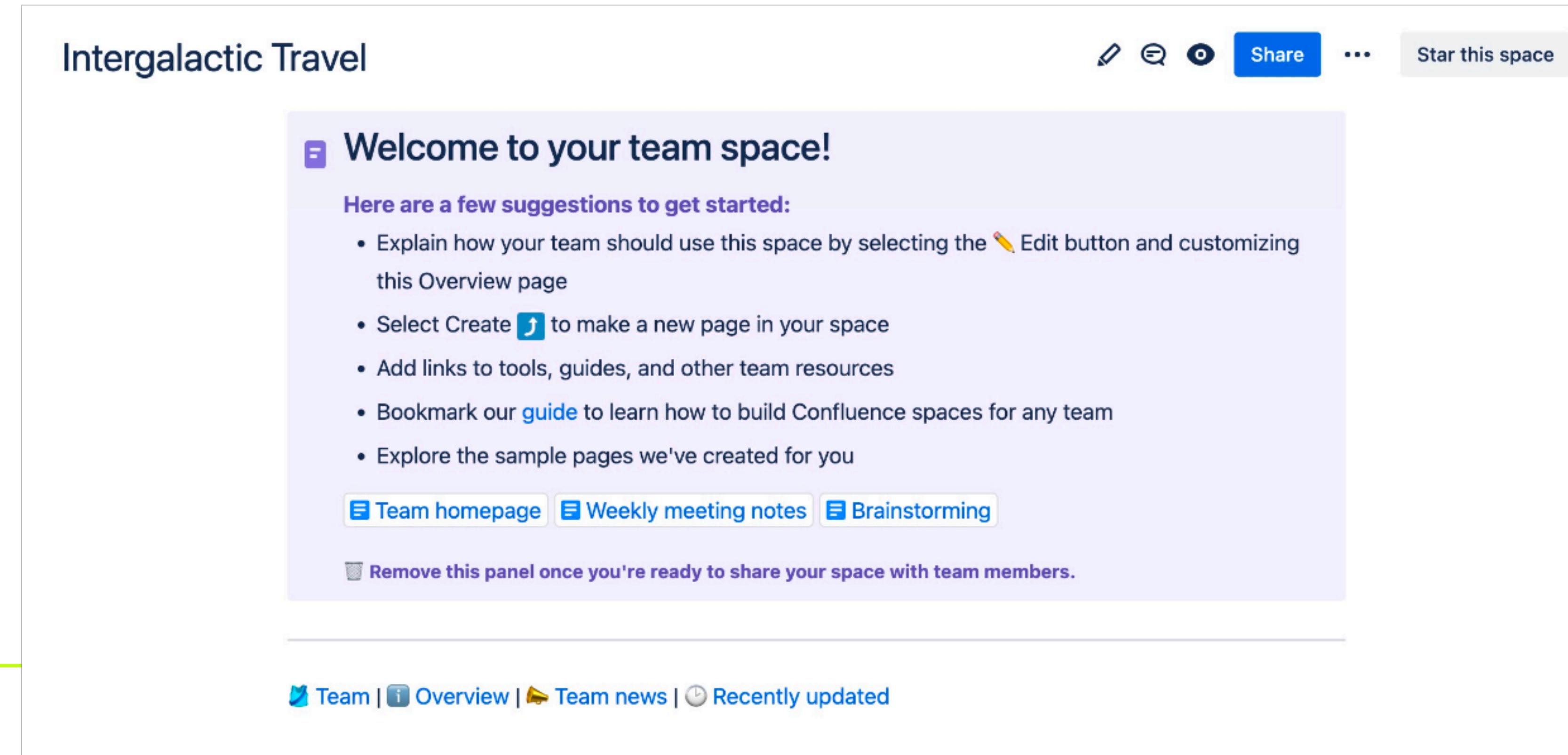
- ✓ **Click in the search box to see recent work.** Before typing a single word, the search bar will populate a list of recent pages and spaces.
- ✓ **Let Confluence guess your search.** As you type, Confluence tries to guess what you're searching for. Watch your screen for instant search results, even before you've finished typing.
- ✓ **Can't remember the page name? Search for any related word.** Confluence will scan similar terms within the page to help you find what you're looking for.



Star pages that you need to return to often.

You can **star** your favorite or most important pages makes them easier to find later. They'll appear in the Starred section of your Confluence homepage.

👉 To star a page, just click the Star this page in the upper-right.



Intergalactic Travel

Star this space

Welcome to your team space!

Here are a few suggestions to get started:

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

 Team homepage  Weekly meeting notes  Brainstorming

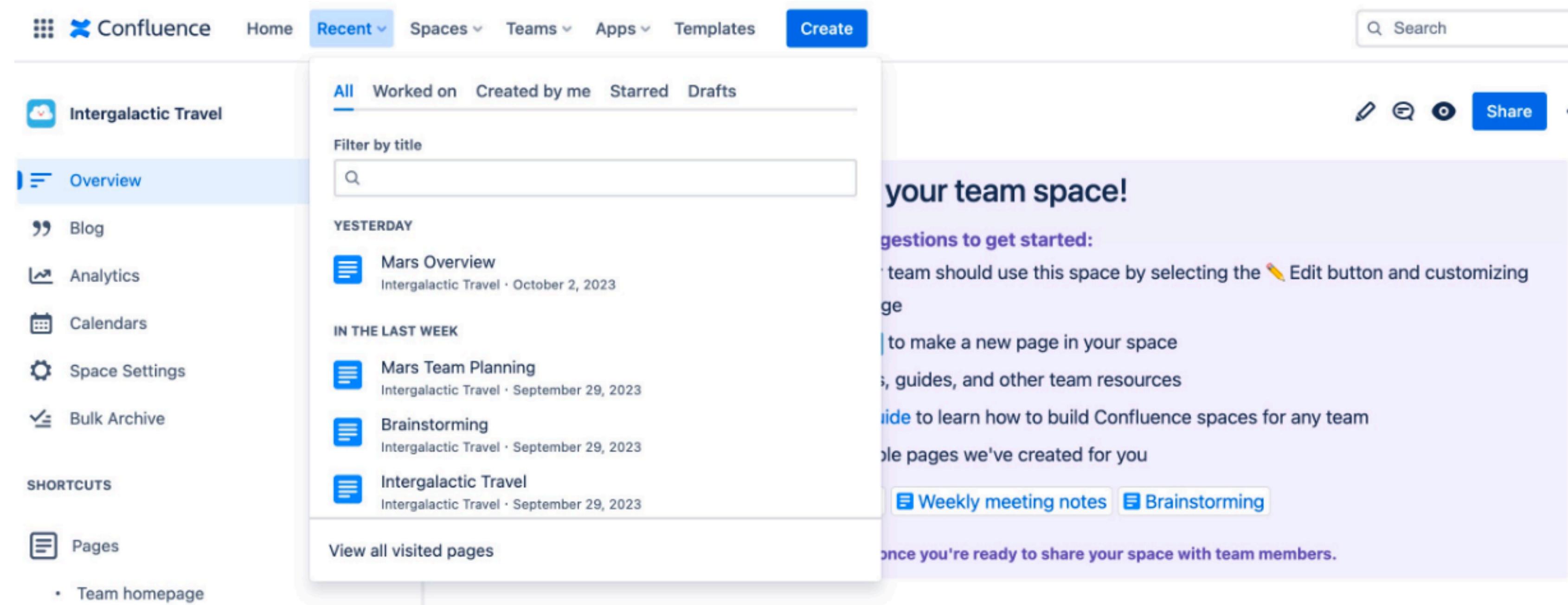
 Remove this panel once you're ready to share your space with team members.

 Team |  Overview |  Team news |  Recently updated

Check Recent to see pages you just interacted with.

If you interacted with a Confluence page recently, but can't remember its name, you can always check the Recent section.

👉 Click Recent in the main navigation bar to see a list of pages you've recently viewed.



The screenshot shows the Confluence interface with the 'Recent' tab selected in the top navigation bar. The left sidebar is open, showing the 'Overview' section. The main content area displays a list of recently viewed pages, categorized by time: 'YESTERDAY' and 'IN THE LAST WEEK'. Each page entry includes a thumbnail, the page title, and the space it belongs to. A sidebar on the right provides information about the 'Intergalactic Travel' space, including a 'your team space!' section and a 'gestions to get started:' section with links to 'Edit', 'Create', 'Space Overview', 'Space Settings', and 'Space Help'.

Category	Page	Space	Date
YESTERDAY	Mars Overview	Intergalactic Travel	October 2, 2023
	Mars Team Planning	Intergalactic Travel	September 29, 2023
	Brainstorming	Intergalactic Travel	September 29, 2023
IN THE LAST WEEK	Intergalactic Travel	Intergalactic Travel	September 29, 2023

Still can't find a page?

Advanced search can help.

With advanced search, you can refine results using search syntax (special words and symbols). Using syntax allows you to search for exact matches, search for keywords using operators, and search for keywords using wildcards.

To start your advanced search:

1. Click the **search bar** at the top right of the screen.
2. Select **Confluence advanced search**.

LET'S TRY!

Search for exact matches

To find a page that contains an exact phrase, use double quotes around your search phrase.

👉 **For example:** Searching for "**product manager**" in double quotes will show search results with that exact match. Results will not contain pages that have only “product” or only “manager.”

Search with operators

If you don't know the exact phrase you're looking for, enter keywords and **operators** in the search field. The available operators are **OR**, **AND**, **NOT**, and **Group**.

OR SEARCH - Searching for **marketing OR digital** will show results that contain one of these terms.

AND SEARCH - Searching for **marketing AND digital** will show results that contain both of these terms.

NOT SEARCH - Searching for **marketing NOT digital** will show results that only contain “marketing” and do not contain “digital.”

GROUP SEARCH - Searching for **(marketing OR digital) AND content** will show results that can contain either “marketing” or “digital,” but must contain “content.”

Search with wildcards

A **wildcard** is a character like **?** or ***** that can be used to replace characters in your search.

To replace a single character, use **?**

👉 **For example:** A search of **b?g** will show pages that have any of the following words: big, bug, bag, beg, or bog.

To replace multiple characters, use *****

👉 **For example:** A search of **manag*** will show pages that have words such as: manage, manager, management, managing, managerial, etc.

NOTE: You can combine exact matches, operators, and wildcards in one search query. For example, you can search **manag* AND **past?** AND ("article" OR "post")**

QUIZ

True or false? Confluence search can find pages related to a specific word, like “vacation,” even if that word doesn’t appear in the page title.

- A. True
- B. False

QUIZ ANSWER

True or false? Confluence search can find pages related to a specific word, like “vacation,” even if that word doesn’t appear in the page title.

- A. True**
- B. False**

[When you search for a keyword, Confluence will scan similar terms within pages, not just page titles.]

QUIZ

Colette wants to find pages that definitely contain the words "holiday", but can contain either "time off" or "PTO". What search should she use?

- A. "time off" OR "PTO" OR "holiday"
- B. "time off" AND "PTO" (AND "holiday")
- C. ("time off" OR "PTO") AND "holiday"
- D. "time off" AND "PTO" AND "holiday"

QUIZ ANSWER

Colette wants to find pages that definitely contain the words "holiday", but can contain either "time off" or "PTO". What search should she use?

- A. "time off" OR "PTO" OR "holiday"
- B. "time off" AND "PTO" (AND "holiday")
- C. ("time off" OR "PTO") AND "holiday"**
- D. "time off" AND "PTO" AND "holiday"

[Colette should use ("time off" OR "PTO") AND "holiday" to search for this content. The parentheses around the OR operator indicate that either of those words can appear. The AND operator outside the parentheses means that "holiday" must appear.]

Using just AND or OR won't meet Colette's requirements.]

SECTION 3

Confluence best practices for beginners

These lessons include expert tips and strategies to get the most out of Confluence. Learn some advanced skills and become your team's Confluence champion .

This section will cover:

- 1. Adjusting your personal settings in Confluence**
- 2. Best practices for organizing content in Confluence**
- 3. Understanding how users interact with your pages in Confluence**

1. Adjusting your personal settings in Confluence

By the end of this lesson, you'll be able to:

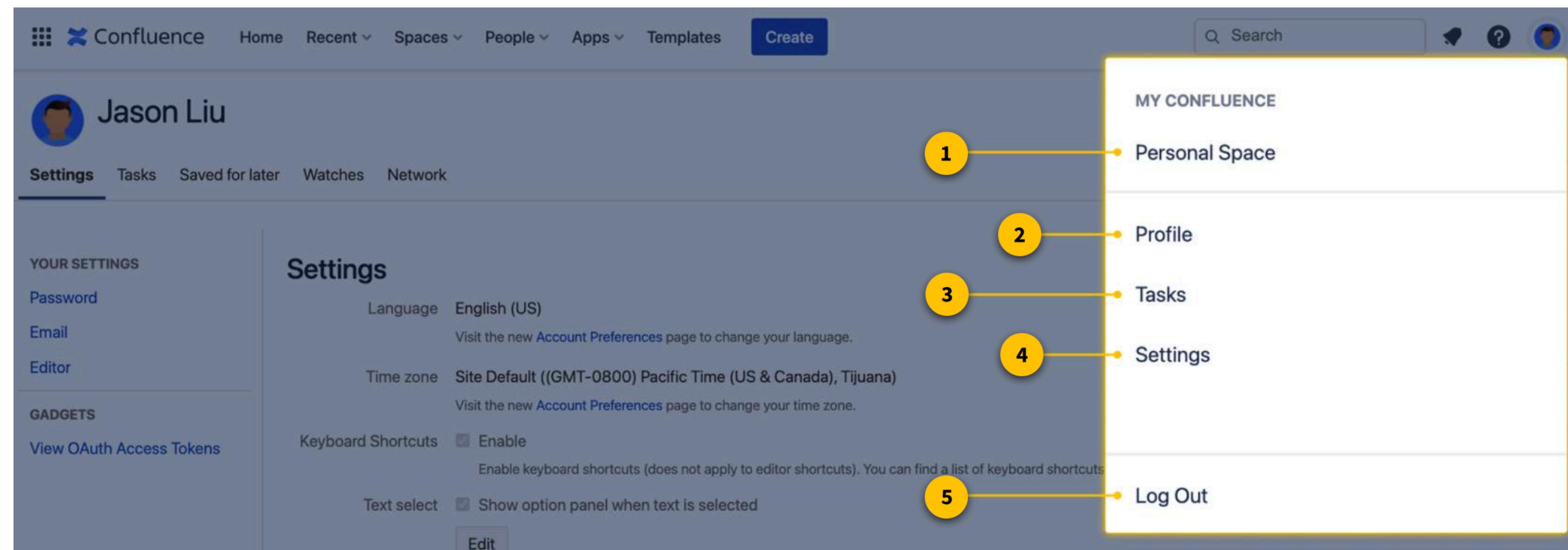
- Tailor Confluence to your needs using personal settings
- Manage your Confluence notifications

How do you get the most out of Confluence?

Personalize your settings to make Confluence work best for you

Confluence is a flexible tool, allowing for a variety of customizations. While your Jira admin or team leader will set up many customizations, there are a few important settings you can control.

To access your personal info, select your **profile icon** at the top right. This will populate a menu of options.



LET'S TRY EACH SETTING OPTION

Tips to optimize your personal settings

1. Update your profile

Your user profile brings clarity to your role, responsibilities, and personal interests. It helps your teammates get to know you and understand what you do. You can add a profile picture, your job title, and any other personal information you'd like to share.

Here's how to update your profile:

1. Click your **profile icon** at the top right of your screen.
2. Select **Profile** from the menu.

LET'S TRY IT!

2. Personalize your email preferences

You'll receive an email when any page you own, star, or watch gets updated. Or if you are mentioned in a comment or page. Every email from Confluence includes a direct link so you can quickly navigate to the page.

If you prefer to receive fewer emails, uncheck the boxes for activities you're not interested in. You can always come back to your settings and update preferences as you wish. You can use an email filter in your email client to manage these notifications, too.

Here's how to update your email settings:

1. Click your **profile icon** at the top right.
2. Click **Settings**.
3. Click **Email** in the far left panel.
4. Then, click **Edit** and use the checkboxes to update your preferences.

LET'S TRY IT!

3. Stop watching certain spaces and pages

One way to de-clutter your inbox is to stop watching spaces or pages you no longer interact with. When you stop watching a space or page, you'll no longer receive email notifications about them. You can stop watching multiple spaces and pages by using the settings menu. Here's how:

1. Click your **profile icon** in the top right.
2. Click **Settings**.
3. Click the **Watches** tab from the top menu.
4. Click **Stop watching** next to any space or page.

LET'S TRY IT!

QUIZ

Where can you stop watching multiple pages?

- A. In space settings
 - B. In your personal settings
 - C. On your homepage
 - D. In your notifications
-

QUIZ ANSWER

Where can you stop watching multiple pages?

- A. In space settings
- B. In your personal settings**
- C. On your homepage
- D. In your notifications

[You can stop watching multiple pages in your personal settings, on the Watches tab.]

2. Best practices for organizing content in Confluence

By the end of this lesson, you'll be able to:

- Create page templates
 - Use labels to easily find related pages
 - Archive pages
-

What if you create a lot of similar pages?

You can create your own page templates.

While Confluence provides some default page templates, you and your organization can create your own. To create a page template in your personal space:

1. Navigate to your personal space overview.
2. In the space sidebar, select **Space settings**, then **Content tools**.
3. Select the **Create new template** button.
4. Design your template and select **Save**.
5. The next time you create a new page in this space, your template will be available in the right panel.

LET'S TRY IT!

NOTE: Depending on how your Confluence site is set up, you may not be able to use your templates in every space or create them in certain spaces. You can always create a page using a template in your personal space, then move it to another space.

How can you make your pages easy to find?

Add labels so pages are easy to find.

Labels are keywords you can add to pages to make them easier to find. They help boost the visibility of your page in the search results, giving your page a better chance of being read.

👉 For example: You can add an "onboarding" label to all pages related to welcoming new employees. A search for "onboarding" will return every page with this label.

To add a label to a page:

1. Make sure you're in edit mode, then select **More actions** (represented by •••).
2. Select **Add labels**.
3. Type each label and click **Add**.

NOTE: Labels work best when everyone on your team uses the exact words consistently. You don't want some tags with "onboarding" and others with "on-boarding." **Whenever possible, select an existing label from the drop-down list to ensure consistency.**

LET'S TRY IT!

How do you keep spaces organized?

The most important way to keep your space tidy is to archive outdated or irrelevant pages.

Archiving a page removes it from your space and stores it away from your daily work. The page will no longer be available in the page tree or search, but is kept in an Archived section in your space.

Here's how to archive a page:

1. View the page you'd like to archive and select **More actions** (represented by **...**).
2. Click **Archive**.
3. You can add a message explaining why the page was archived.

LET'S TRY IT!

QUIZ

Where can you create a new page template?

- A. In space settings
 - B. Using the Create button
 - C. In the page tree
 - D. Using the More actions button
-

QUIZ ANSWER

Where can you create a new page template?

- A. In space settings**
- B. Using the Create button
- C. In the page tree
- D. Using the More actions button

[You can create page templates in space settings. Though creating a template may look a lot like creating a page, you have to start by clicking Create new template in the Content tools section of your space settings.]

QUIZ

Haru wants to add a label to her page indicating that it's a page about Q1 strategy. What should she do?

- A. Add her own “Q1” label regardless of what labels are already in use.
- B. Not add a label; she shouldn’t use labels to tag pages.
- C. Check to see if there is a suitable label that already exists in the label dropdown.
- D. Use a longer label, like “Q1-strategy-for-marketing-team,” to be more specific.

QUIZ ANSWER

Haru wants to add a label to her page indicating that it's a page about Q1 strategy. What should she do?

- A. Add her own “Q1” label regardless of what labels are already in use.
- B. Not add a label; she shouldn’t use labels to tag pages.
- C. Check to see if there is a suitable label that already exists in the label dropdown.**
- D. Use a longer label, like “Q1-strategy-for-marketing-team,” to be more specific.

[You should always check existing labels to see if there's a suitable one already in use. Labels help identify pages on similar topics or with similar purposes. But, they'll only work if people use the same label.]

3. Understanding how users interact with your pages in Confluence

By the end of this lesson, you'll be able to:

- Troubleshoot page permissions
- Gain insight from page analytics

What if you need to work on a page without others viewing it?

You can control who can view and edit your pages.

Pages are open to viewing or editing by default, but you can restrict which users and groups can view or edit a Confluence page.

👉 **For example:** You might want to keep a page private between you and a co-worker as you work on it, but then open access when it's ready for others to view or edit it. Or, you may want to take notes for your manager one-on-one meeting that are private to you and your manager.

There are three ways you can set up restrictions:

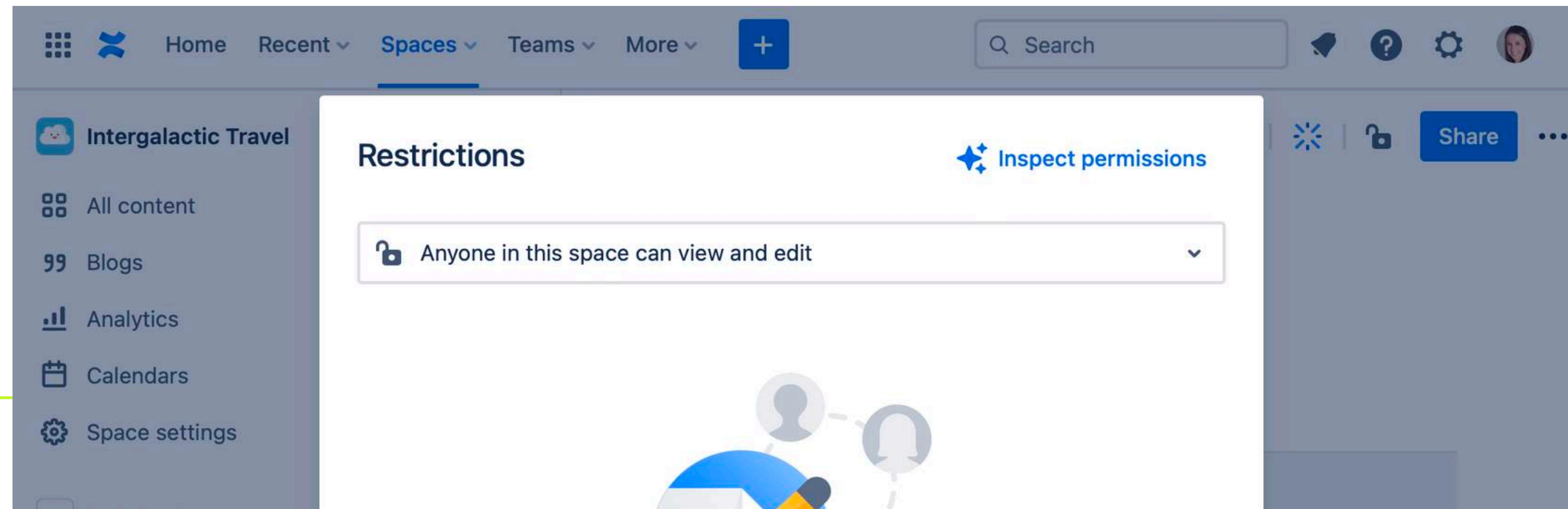
1. Anyone can view and edit the page
2. Anyone can view, but only some users can edit the page
3. Only specific users can view or edit the page

What if someone can't access your page?

Admins can also restrict what users can do in spaces and throughout Confluence. While you can control who can see and edit the pages you create, admins also have to give them access to editing and viewing pages in Confluence in general.

The **Inspect permissions** tool can help you understand why a user can't see your page.

👉 To use the Inspect permissions tool, click the lock icon on a page, then Inspect permissions.



How do you know who's seen your page?

Page analytics give you insight into how users are interacting with your page.

Confluence gathers data about how users view your pages, including:

- ✓ **How many users** have viewed your page
- ✓ **When they last** viewed your page
- ✓ **How many times** each user has viewed the page

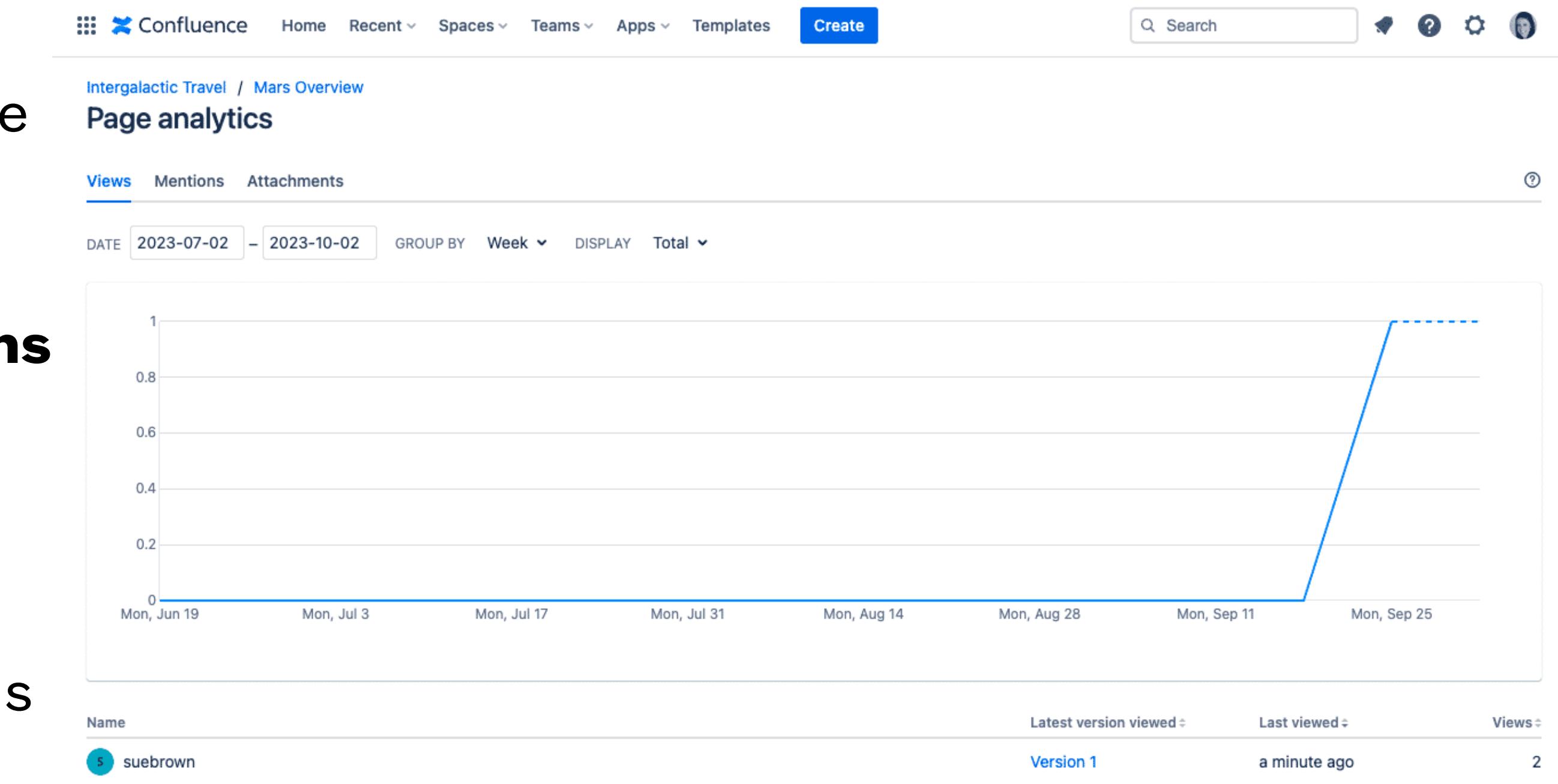
To see your Page analytics dashboard:

1. Navigate to your page, then select **More actions**

(represented by ).

2. Select **Analytics**.

 The Page analytics dashboard also presents this information as a graph.



NOTE: Only works with Premium or Enterprise edition

QUIZ

You sent Kevin a link to your page. Kevin says he can't access the page. What can you do to troubleshoot?

- A. Share the page with Kevin using his email address.
- B. Add a shortcut to the page in your space sidebar.
- C. Use the Inspect permissions tool.
- D. Change the page to a blog post.

QUIZ ANSWER

You sent Kevin a link to your page. Kevin says he can't access the page. What can you do to troubleshoot?

- A. Share the page with Kevin using his email address.
- B. Add a shortcut to the page in your space sidebar.
- C. Use the Inspect permissions tool.**
- D. Change the page to a blog post.

[The Inspect permissions tool helps identify why a specific user can't see a specific page. It's your best asset for troubleshooting.

Sharing the page with Kevin won't grant him access to a page; it'll only send him an email notification about it. Adding a shortcut to the page or changing it to a blog post also won't help as that won't change either Kevin's Confluence permissions or that page's restrictions.]

QUIZ

What do page analytics show you? (Select two correct answers.)

- A. How many users have visited that space
- B. When users last viewed the page
- C. How long a user spent reading the page
- D. How many times a user has viewed the page

QUIZ ANSWER

What do page analytics show you? (Select two correct answers.)

- A. How many users have visited that space
- B. When users last viewed the page
- C. How long a user spent reading the page
- D. How many times a user has viewed the page

[Page analytics show you when users last viewed a page and how many times they've viewed a page. They don't provide information about a space, just a single page. They also don't provide data on how long a user was on a page.]

Fin!