

Confluence 6.0.5

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Learning Objectives

The learner will be able to:

1. Log on and navigate the Confluence Dashboard including creating favorite spaces and a network of people.
2. Update their profile including adding a photo and contact information.
3. Create and customize a Confluence page using formatting, inserting images, adding macros and creating child pages.
4. Create a blog including a splash page that houses archived blogs.
5. Customize the space and the sidebars using Space Tools.

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What is Confluence?

Confluence is a web-based wiki that can be used to collect, organize and display information. The wiki pages can be private to just one person, available to just a certain group of people, or completely public.

Some uses could include a department intranet with a news blog or pages with how-to articles and policies. Pages can be shared with a group of people with permissions for everyone (or no one) to make changes and updates. The administrator of the page sets the viewing and editing permissions for each space.

Rowan employees are able to create a personal space where notes from meetings and conferences can be stored, or information about a class.

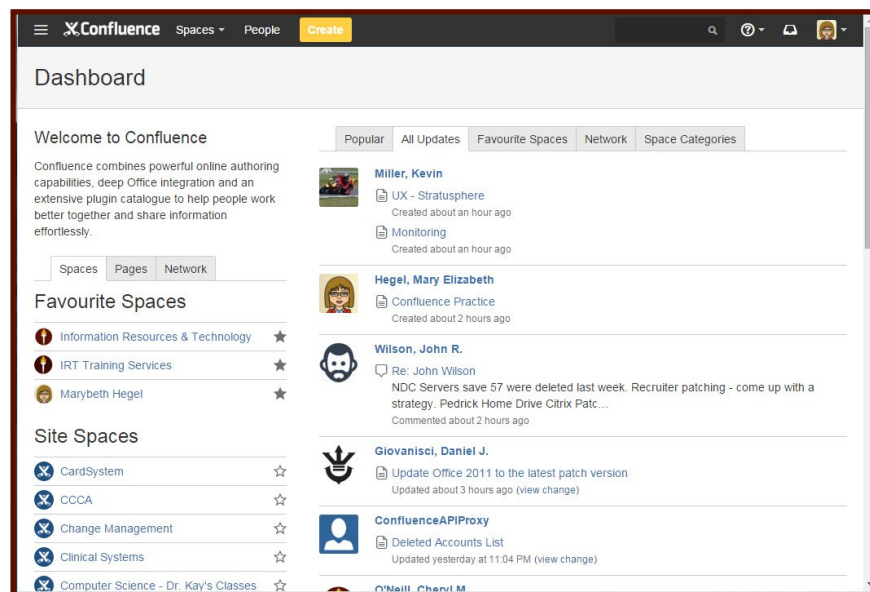
Each Rowan employee already has a personal space. To request a confluence space for your department or group, email support@rowan.edu with the following information:

- o Who is the Administrator?
- o What is the reason for this space?
- o What is the name of this space?

An email will be sent to you when your site has been created.

Rowan University currently uses Confluence 6.0.5. How-to articles and videos for this application can be found on:

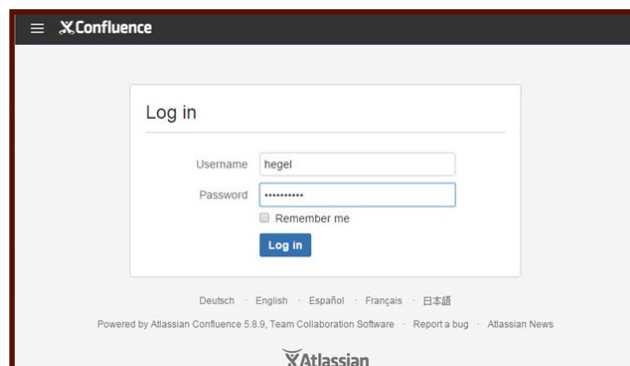
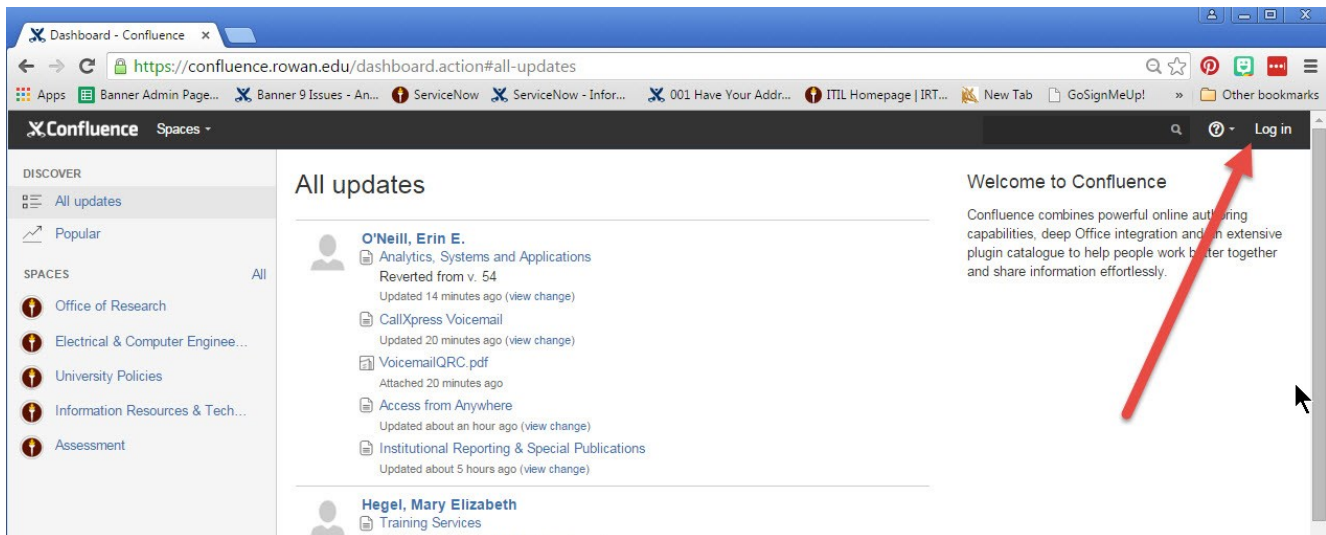
<https://confluence.atlassian.com/display/CONF58/Confluence+Documentation+Home>



Log On to Confluence

Go to confluence.rowan.edu

Select Log in from the top right corner and log in with your Rowan network username and password.



Dashboard

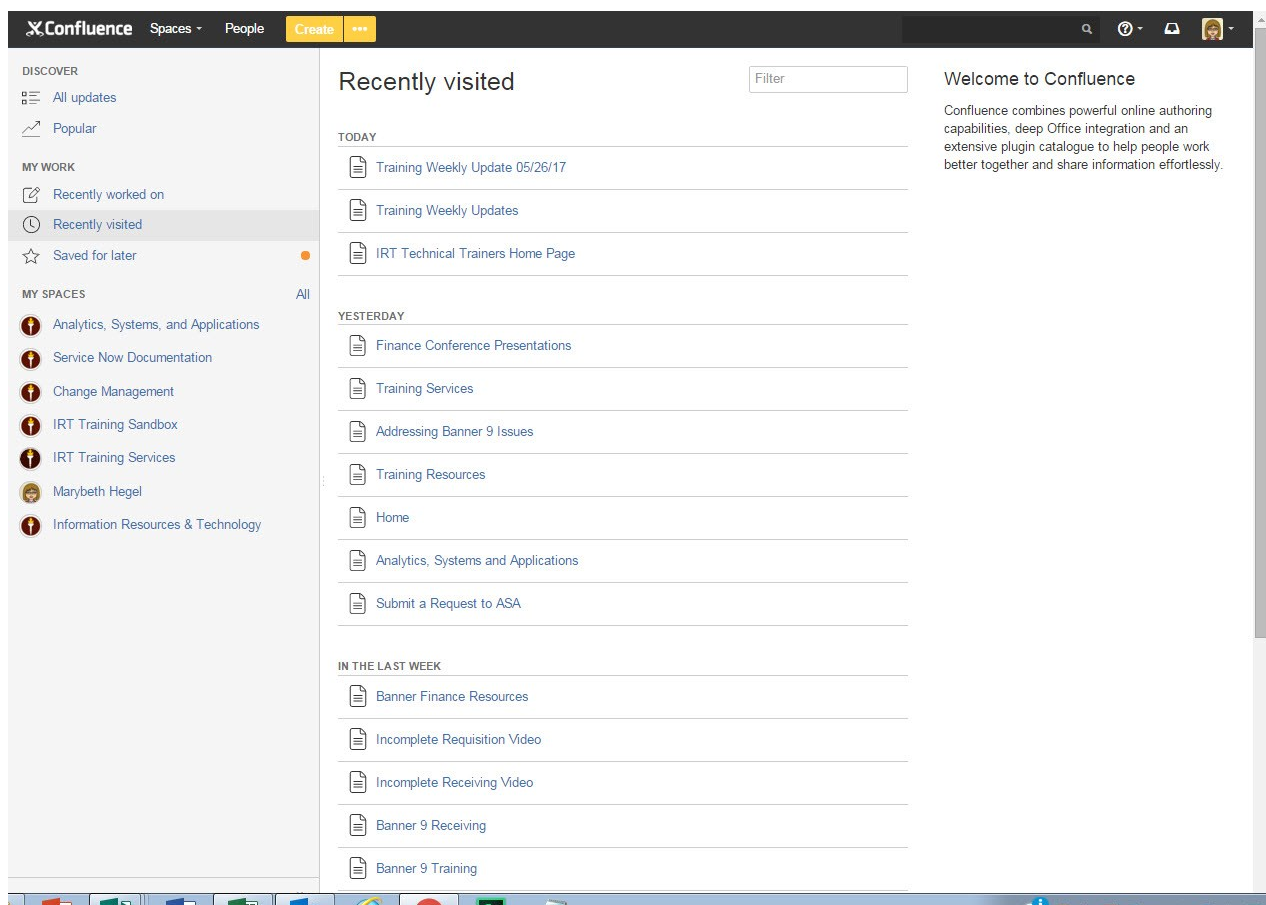
The Dashboard is the home page of the application. Here you can set up favorites and get updates about all the spaces you are following. It also gives you a quick view of all the activity on your pages and your favorite pages. To get back to the Dashboard from any page, select the Confluence logo on the top left side.

On the left side you have three tabs -

Discover - All updates, or the most popular.

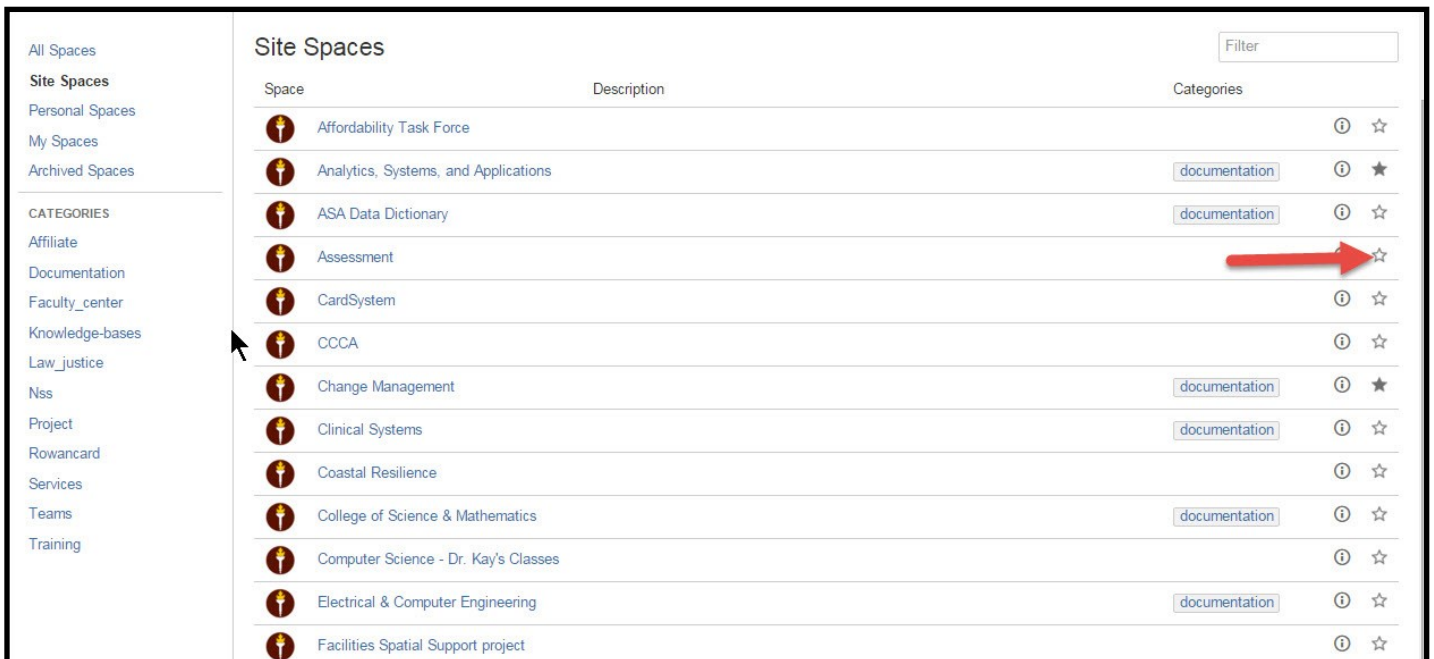
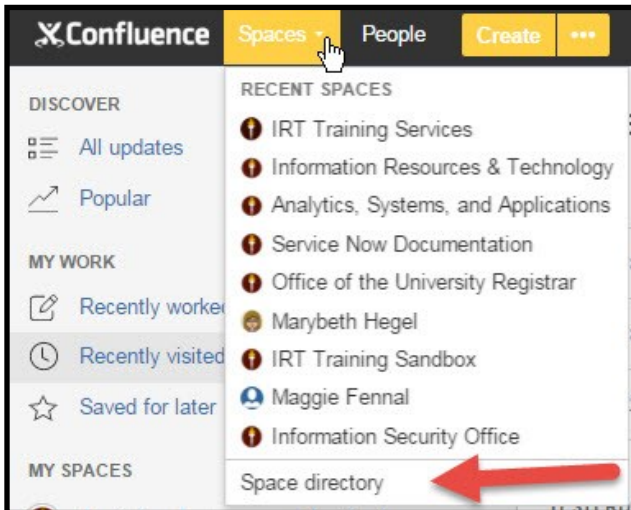
My Work Pages you worked on, visited or saved.

My Spaces Spaces you indicated as favorites.



Dashboard

From the top menu, select Spaces, and then Space Directory. Select the star to the right of the space to make it a favorite.

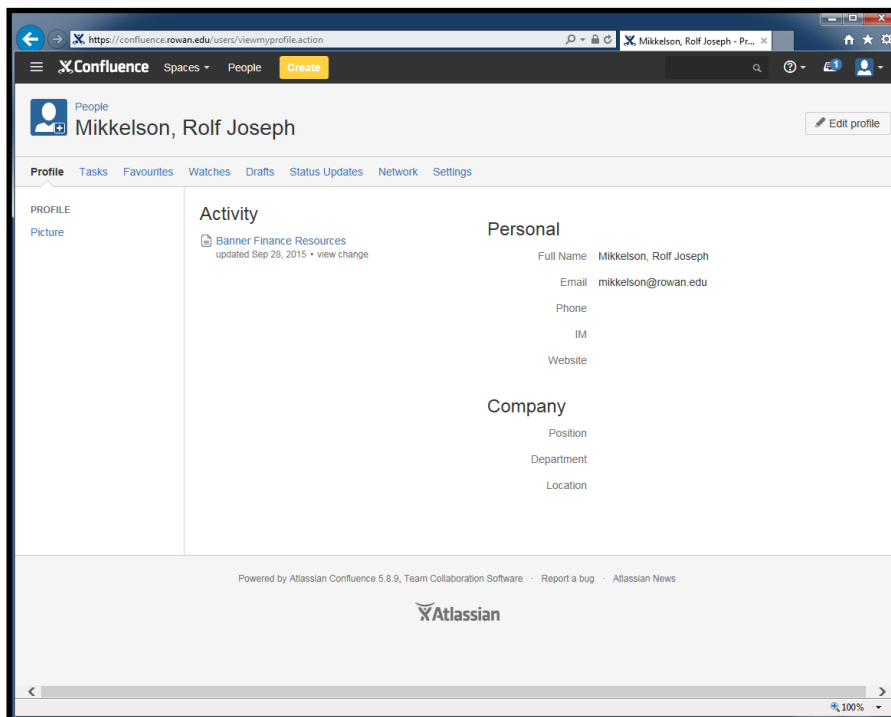
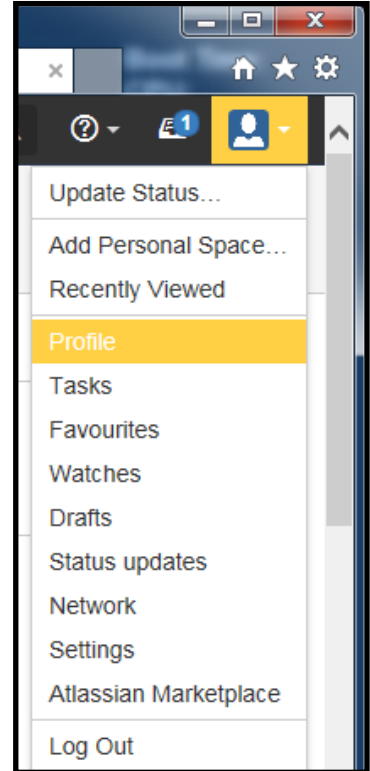


Profile

In the top right corner you will see a little person icon with a drop down arrow

Select the drop down, and then select Profile.

On the profile page you can edit information about yourself, add a photo, look at your tasks, etc.



Personal Space

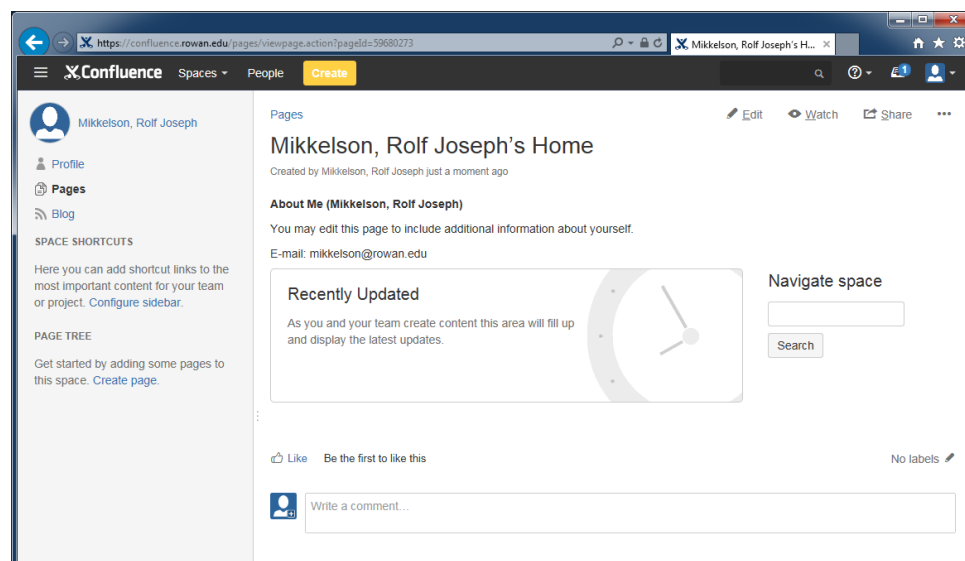
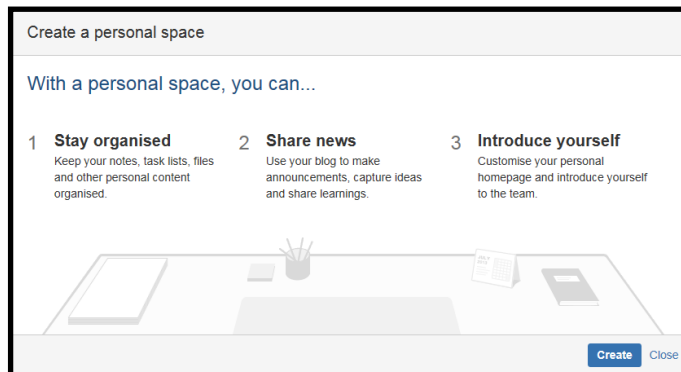
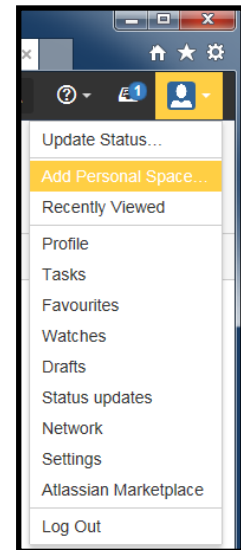
All employees have a personal Confluence Space that you can add pages to as you need them.

In the top right corner of the page, select the drop down arrow next to little person icon.

Select **Add Personal Space**.

Select **Create**.

Your personal Confluence space will open.

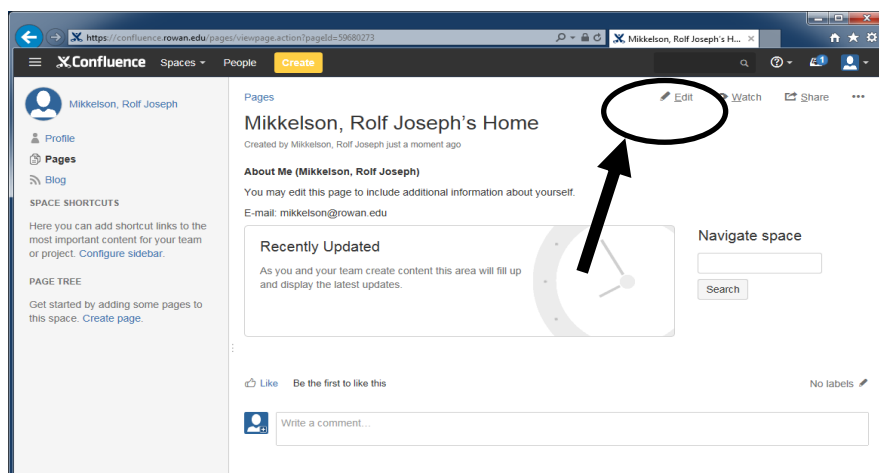


Edit a Confluence Page

Each Confluence Space is a collection of Pages. Pages can be created from a Blank Page or from many different templates such as How-To Articles, Blog Posts or Meeting Notes.

Once a page is created, it can be edited by selecting Edit from the top right side of the page to change the content of the page.

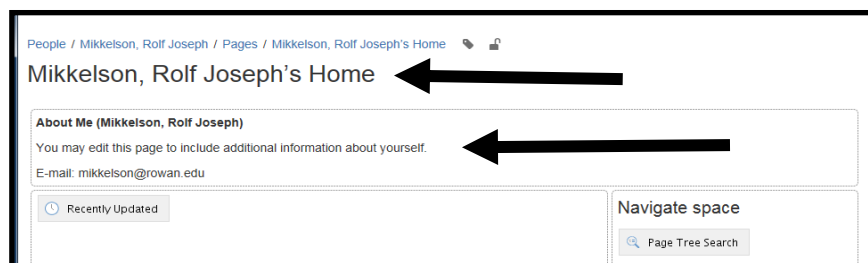
Select **Edit** from the top of your home page in your personal space.



Select the title to change the name of the page.

You will see various boxes with dotted lines. These are sections used to organize your information.

Select the first section and type information about yourself (department, title, phone, email).



Insert Macros

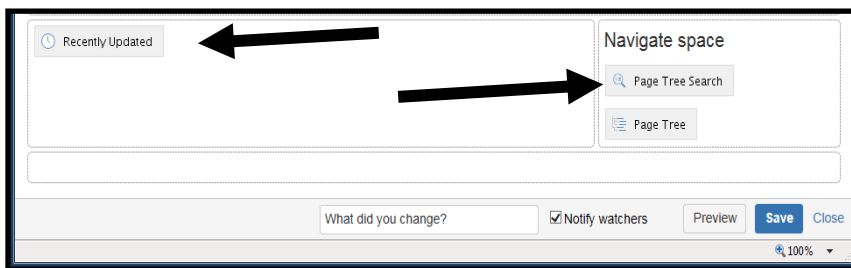
Macros add additional functionality to your page. For instance, the Widget macro allows you to add YouTube videos. The Children Display macro lists all the child pages of a page. For more information and descriptions of Macros see

<http://tinyurl.com/jsjoiy7>

The second section contains a macro called “Recently Updated”. This will automatically show all the updates on your page.

The Navigate Space section on the right shows the macros “Page Tree Search” (allows you to search the space) and “Page Tree” (shows you the layout of the space) macros.

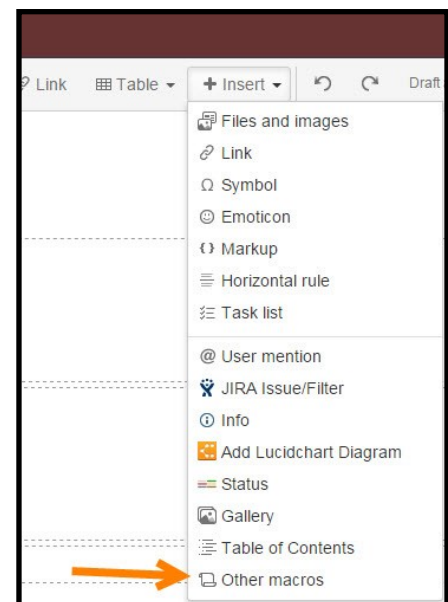
Macros can also be moved around to different spaces, or deleted as needed.



Select the third bottom section of your page (it should be empty).

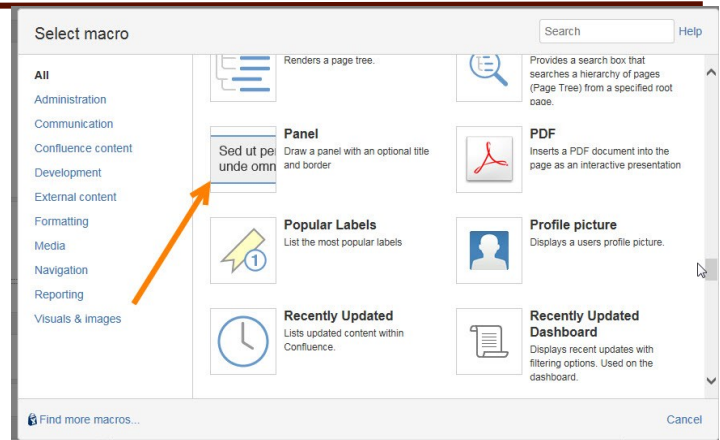
From the menu bar, select **+Insert**.

Select **Other macros**.



Insert Macros

Select the Panel macro.

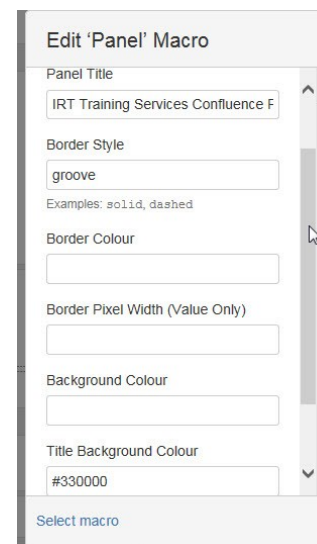


Customize Colors, border type etc..

Hint: Rowan Official colors are #330000 (brown) and #FFCC00 (yellow)

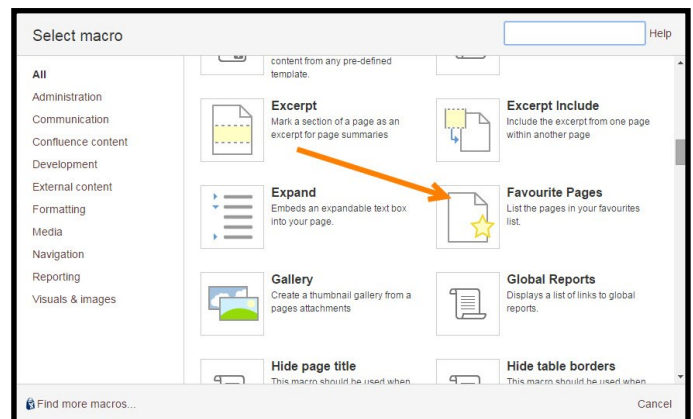
Practice with these border types to see what you like:

none, hidden, dotted, dashed, solid, double, groove, ridge, inset, outset, initial, inherit



IRT Training Services Confluence Page

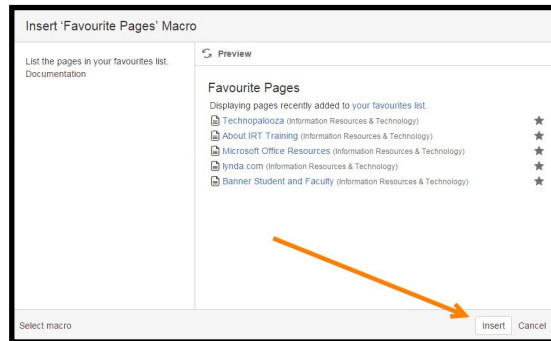
Select inside the panel macro, the go to Insert Macro and select the Favourite Pages macro.



Insert Macros

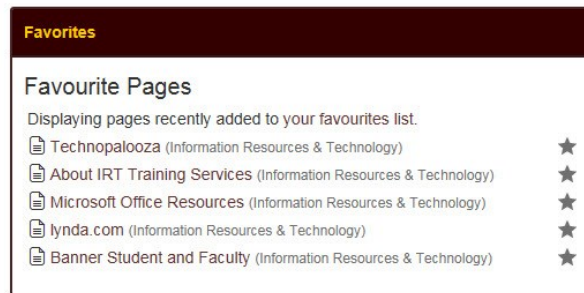
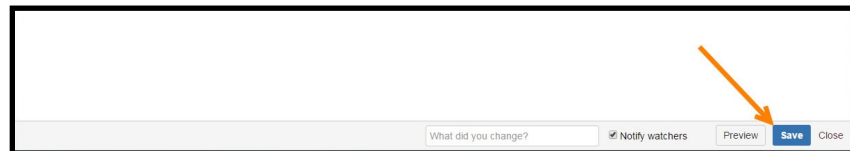
It will give a preview of what it will contain.

Select Insert.

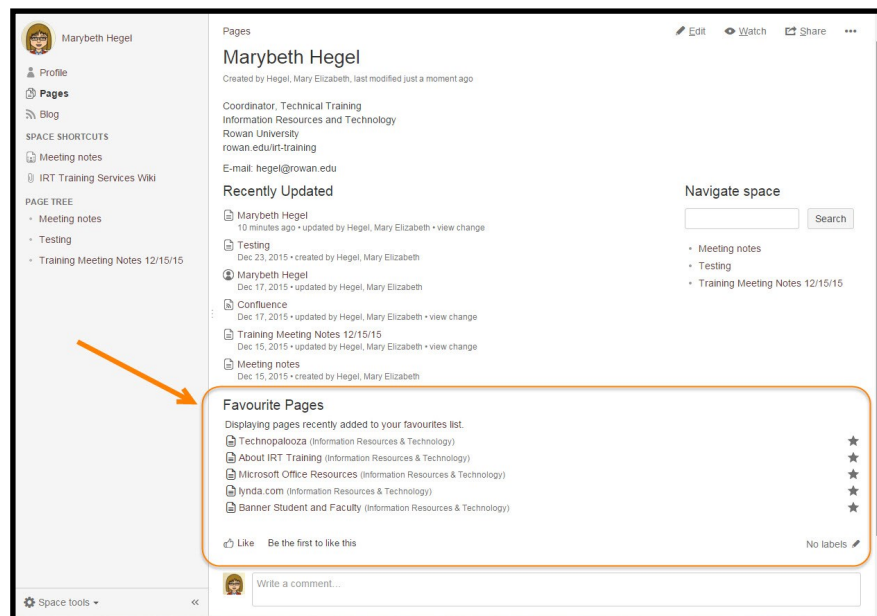


Favorite pages will show inside the Panel - Favorites.

Select Save.



Your page now lists all your favorite pages (that you chose on the Dashboard page).

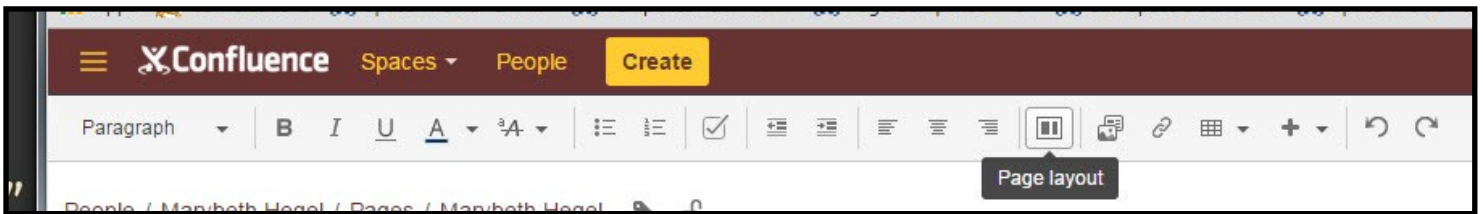


Format Sections

Select Edit to edit your page again.

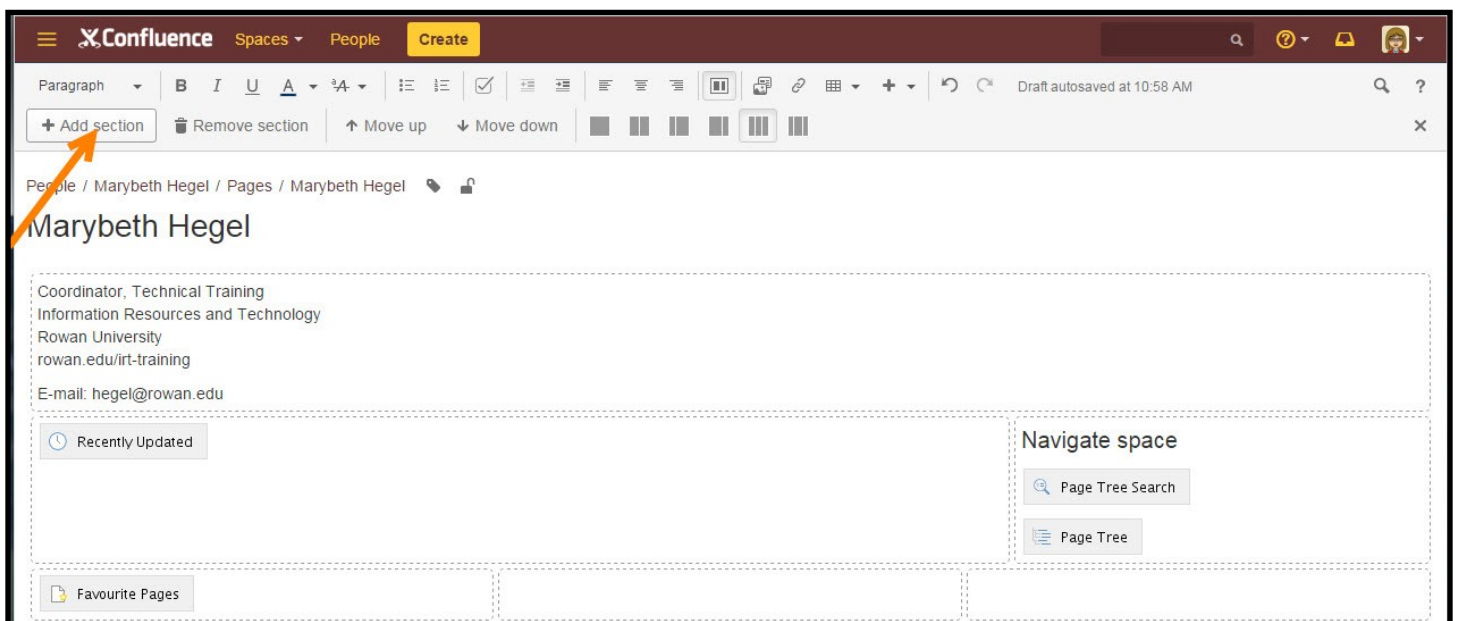
Select the section that has the Favorite Spaces.

Select the **Page layout** icon from the top menu.



From the Page layout icon you can create columns within the section. You can also add or remove sections.

Select the layout with three columns.



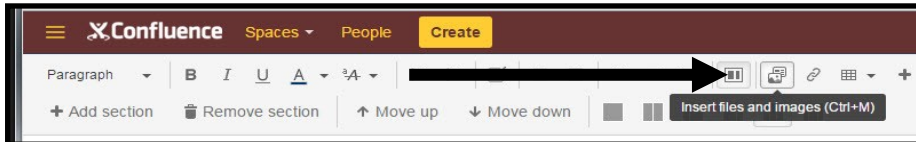
Insert Images

You can insert images and files on your page.

Select one of the empty sections



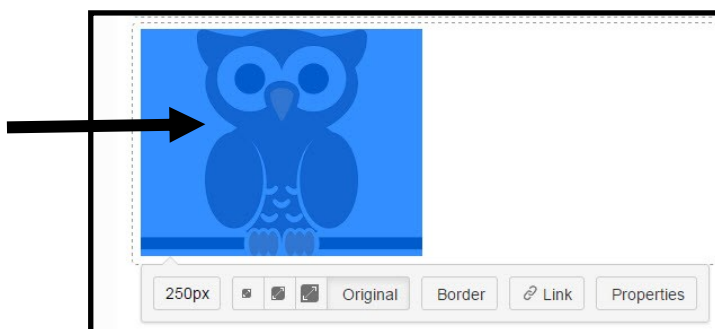
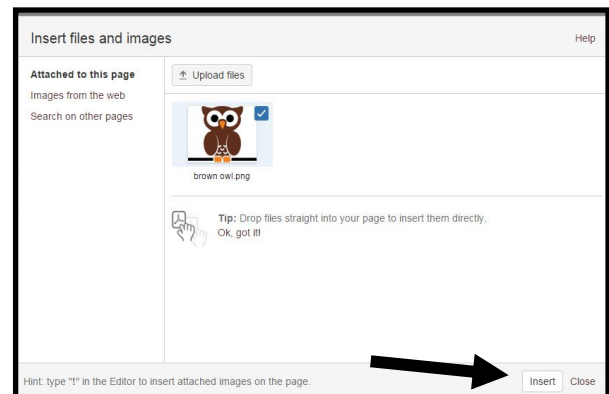
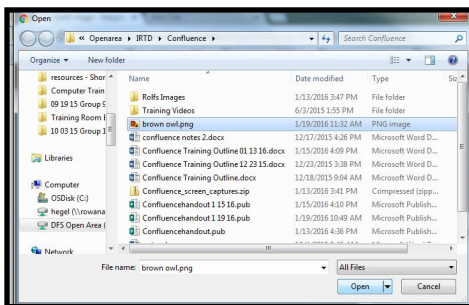
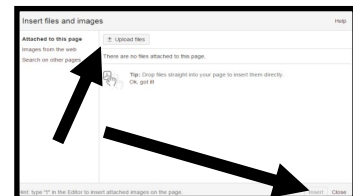
From the top menu, select the icon Insert files and images.



Select Upload files.

Choose a file from your computer to upload .

Insert the image.

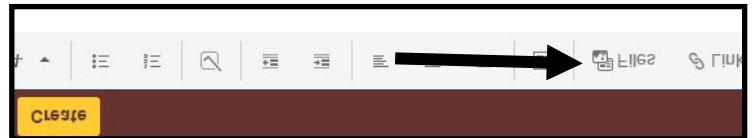


Select the image (on the page) to see the formatting menu underneath it.

Insert Links

Links that lead to other pages in the space, or to other pages on the Internet, can also be entered on a page.

Select the last empty section on your page.

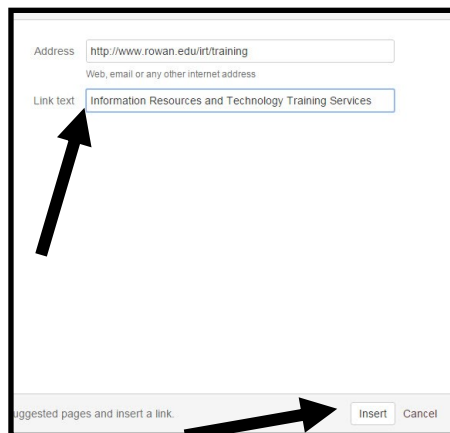
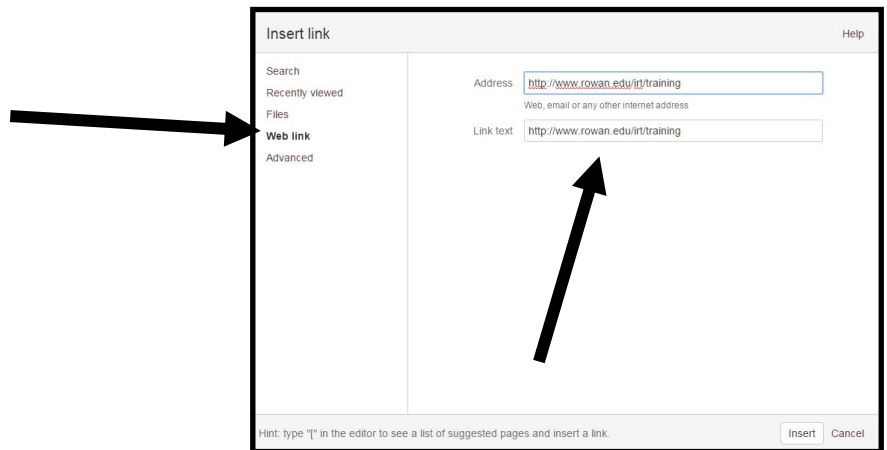


Select **Web link** from the dialog box side bar.

Type in the web address.

You can replace the **link text** with something else, if you wish (like the name of the page).

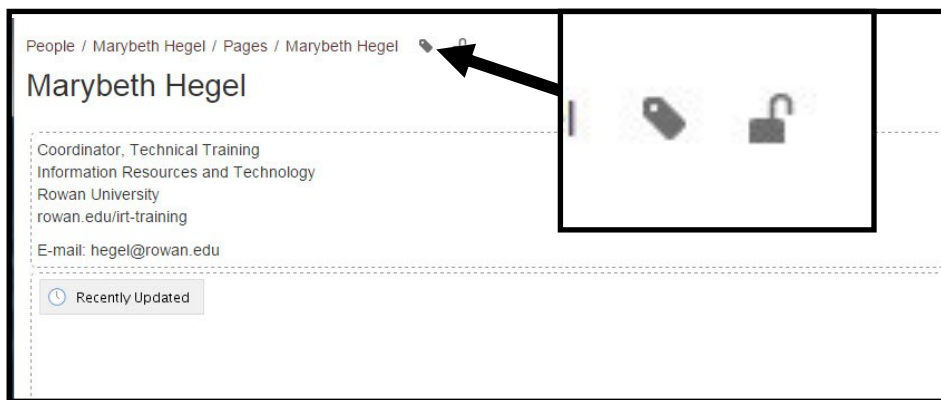
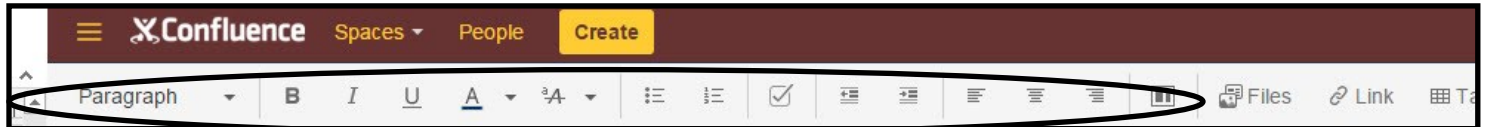
Select **Insert**.



Format and Label

Using the menu bar at the top of the page, you can format the alignment, color and size of the text, and many other elements of the page to make it more readable for your audience.

You can also move items around to different spaces, by dragging or copy and paste.



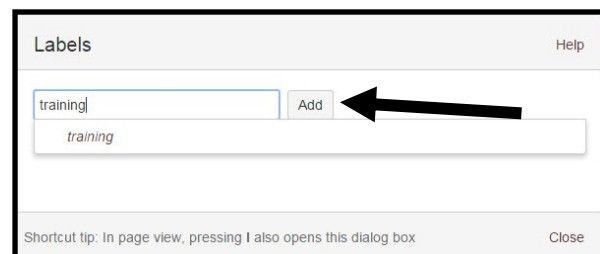
It is also a good practice to label your pages with keywords, to allow people to search for information on your page, and to filter it (to be covered later).

Select the little tag next to the title of the page.

Enter a keyword in the dialog box.

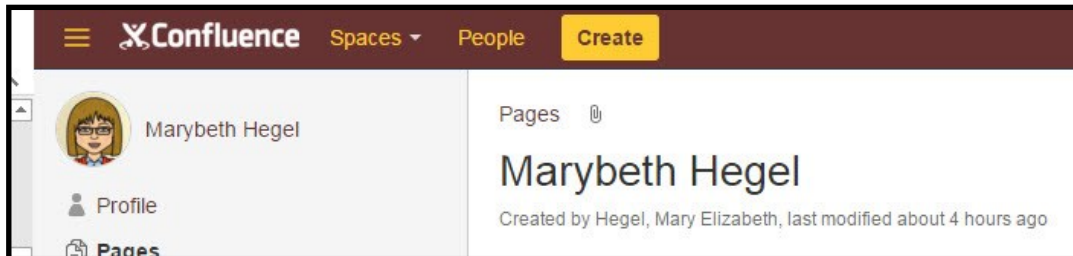
Select Add.

When finished select Close.

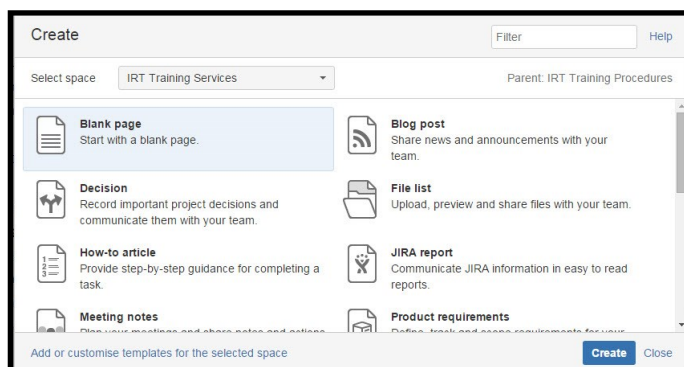
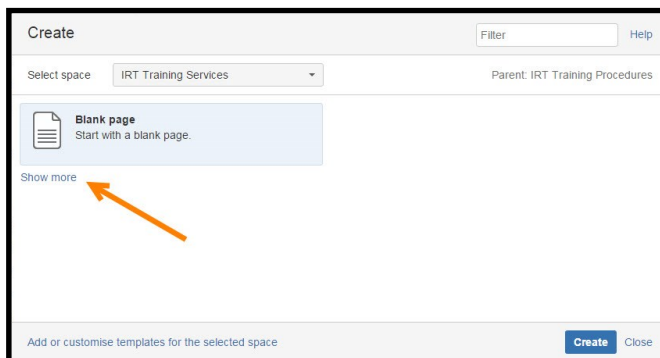


Create a New Page

To create a new page in your space, select the Create button at the top of your page. The page you are working on will become the parent page of the new page.



If you only see the Blank page template in the dialog box, you can select “show more” to reveal other available templates.



Create a Parent Page with Child Pages

Some departments use Confluence to store policies and procedures. The information is entered on a blank page and may be the child of a main (parent) page.

For example, you could create a parent page called Banner Finance. Then you could create detail pages that branch off of that page (called child pages) that describe how to do receiving, requisitions and budgets.

1. Create a blank page. Make the title “Banner Finance”.



breadcrumbs

2. While you are on the parent page, create three more blank pages. Make sure you use the breadcrumbs at the top of the page to navigate back to the parent page, after you create each child page. Label each page with the keyword **banner_finance**.

Child page 1 - How to do a requisition in INB and SS

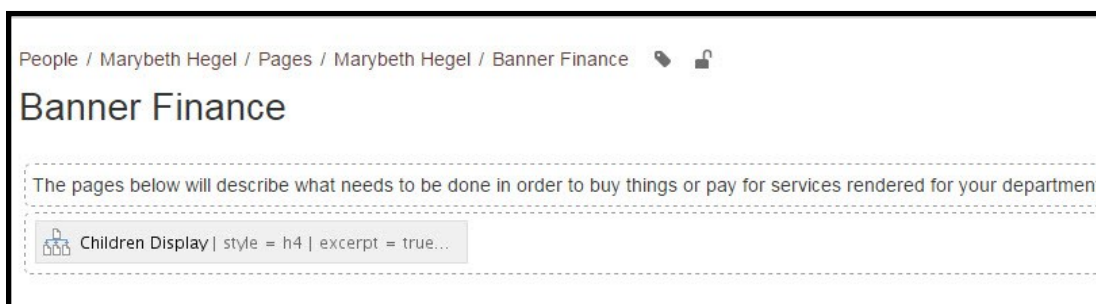
Child page 2 - How to do receiving in INB

Child page 3 - How to check your budget

3. Edit the parent page (Banner Finance).

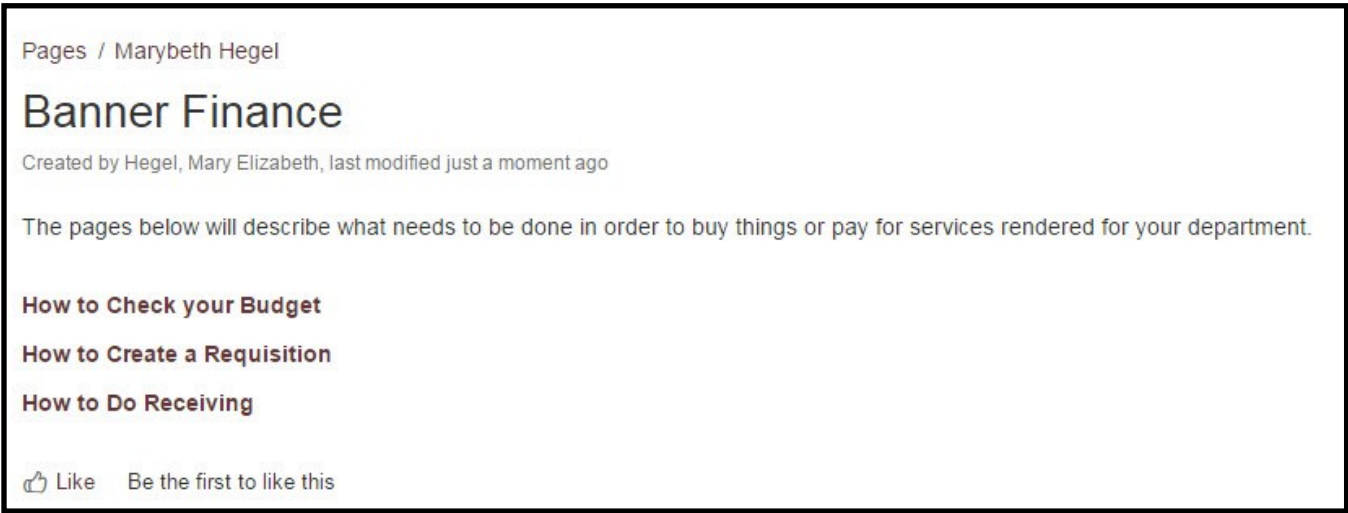
4. Add a section to the parent page describe what these policies or instructions are about.

5. Add another section. Add a macro to that section called Children display. Select your options and insert.

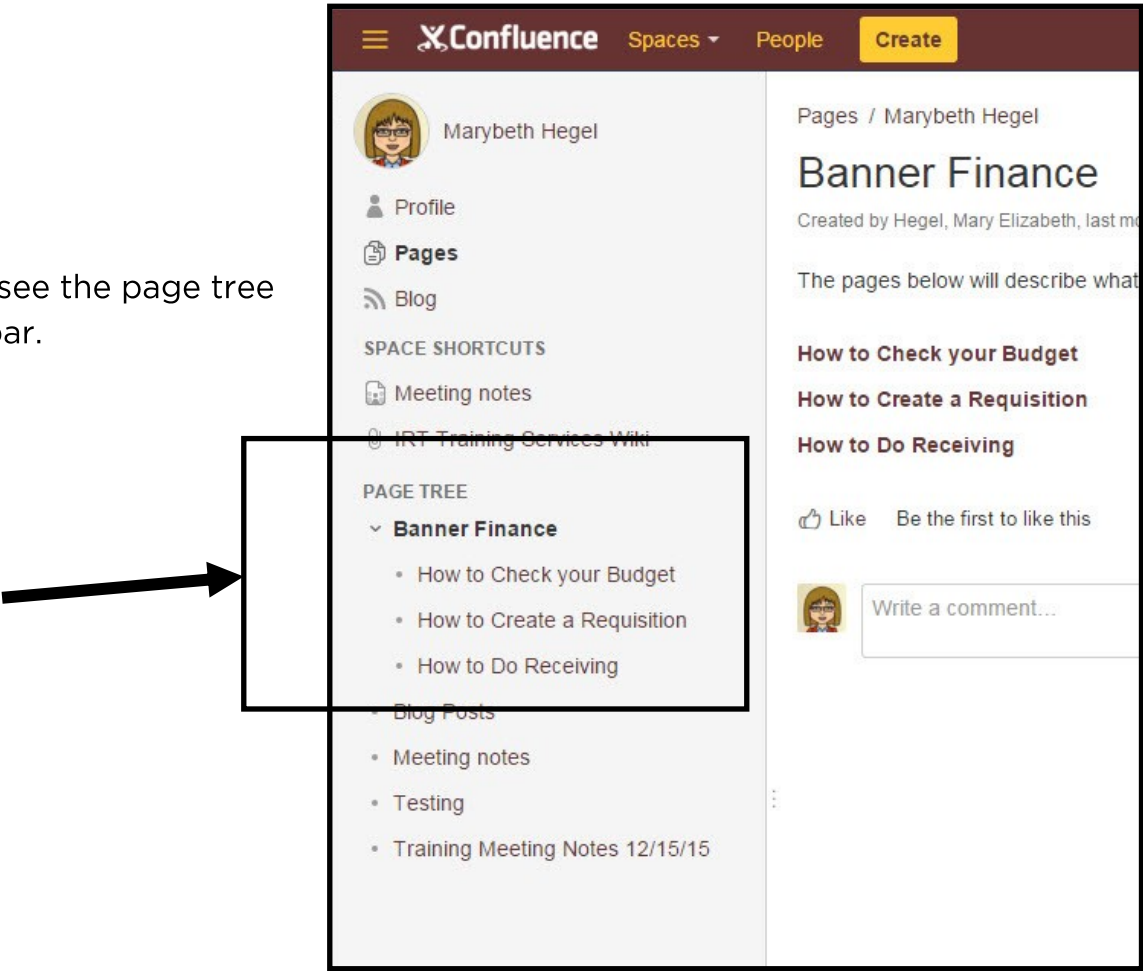


Create a Parent Page with Child Pages

Your main page will now have links to its child pages.

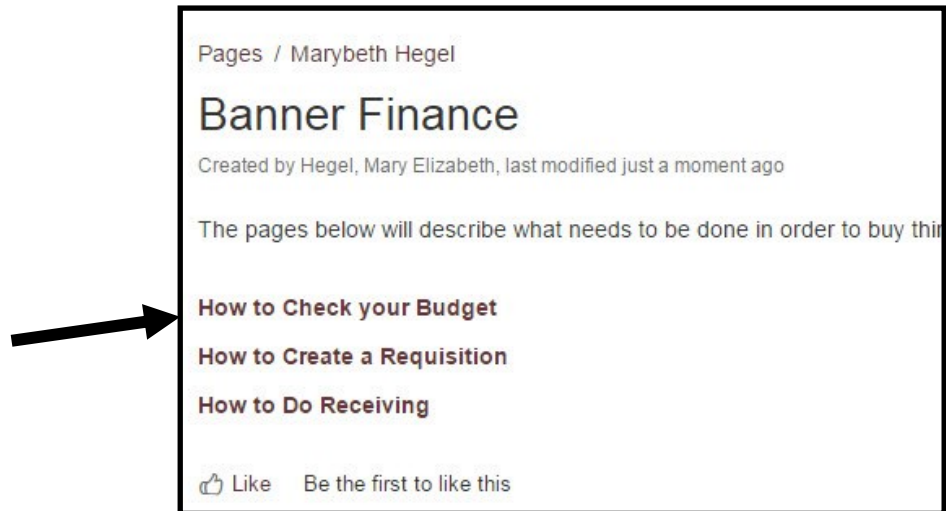


You will also see the page tree in your side bar.



Create a Parent Page with Child Pages

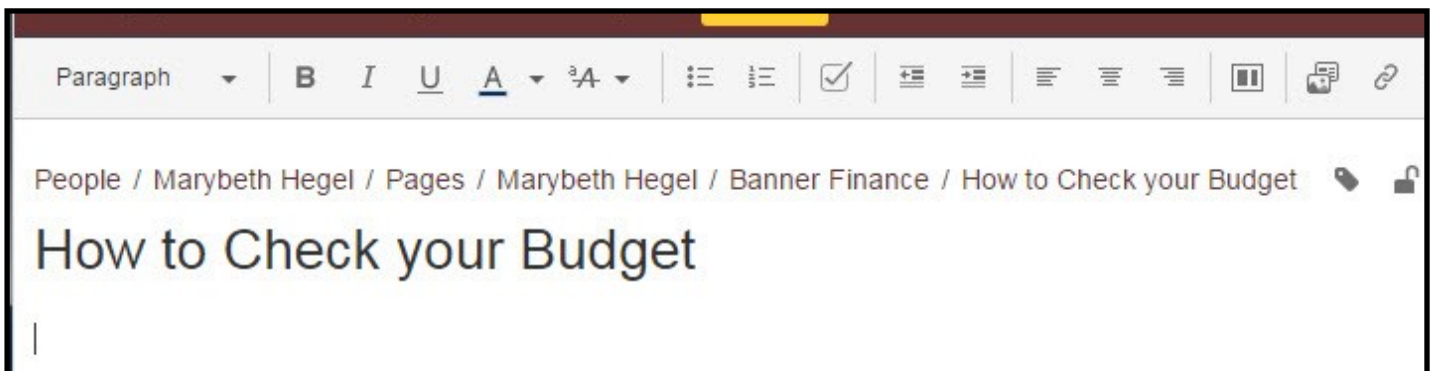
To add information to any of the pages, select the page either from the sidebar or parent page.



Select Edit from the top of the page (right side).



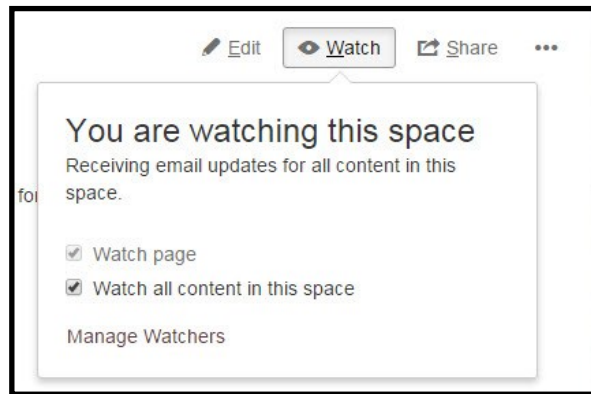
Start adding information to your page. Format by using sections, macros, files, images and more.



Other options - Delete, Watch, Link

At the top right of each page there are four items (Edit, Watch, Share and ...)

If you select Watch, you will be emailed each time a page is changed. So if you are watching a blog, then any time it is updated, you will be sent an email.

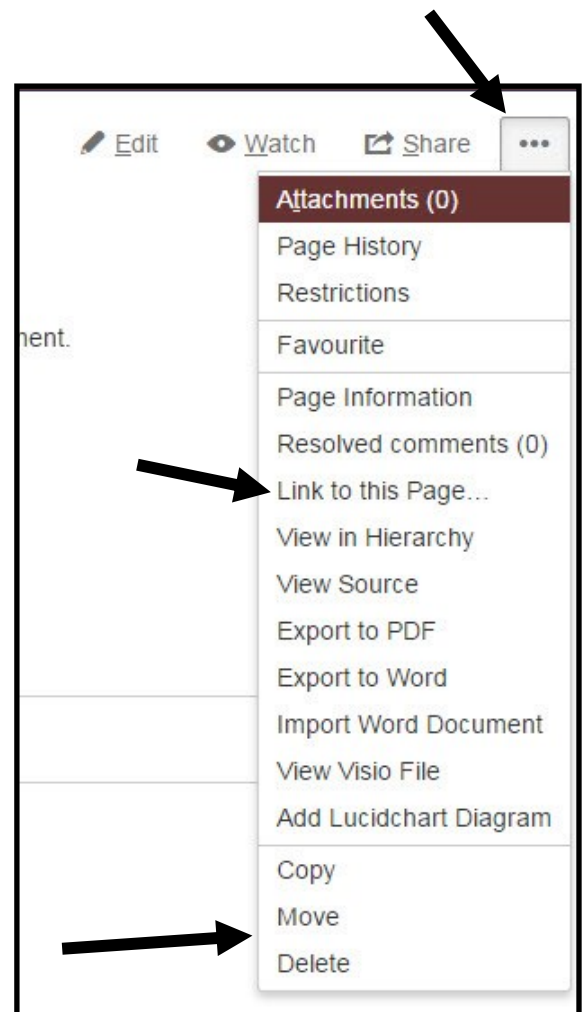
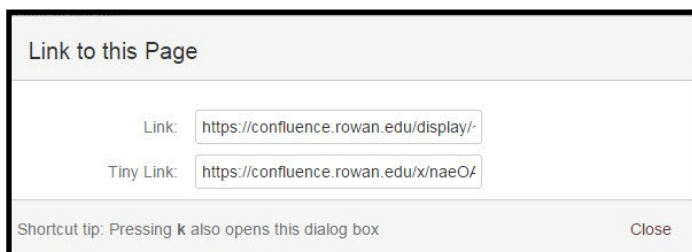


Select ... and you will see even more options.

At the bottom of the page is **Move** (move a child page to a different Parent page).

There is also Delete which will allow you to delete a page (if you have that permission).

Link to this Page will generate a static tiny link for you to email or put on another page. This link will not change, even if you change the title of the page.



Blog Posts

Blogs are generally used for news or information that doesn't change. Some departments use them for a Dean's message or accolades. You can filter Blogs based on labels, and you can save them in an archived area.

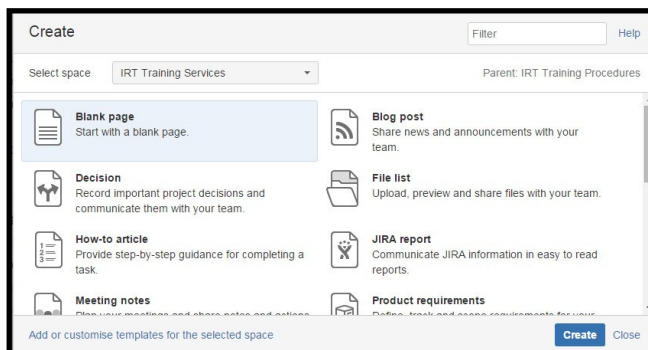
First set up a page where your blogs will be organized.

Select **Create** from the top menu of the page.

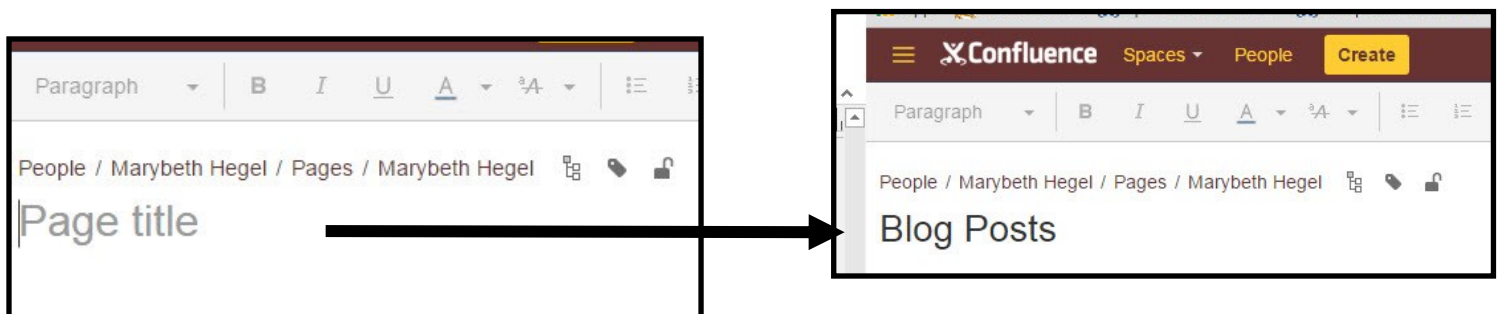


Select the Blank page template.

Select Create.

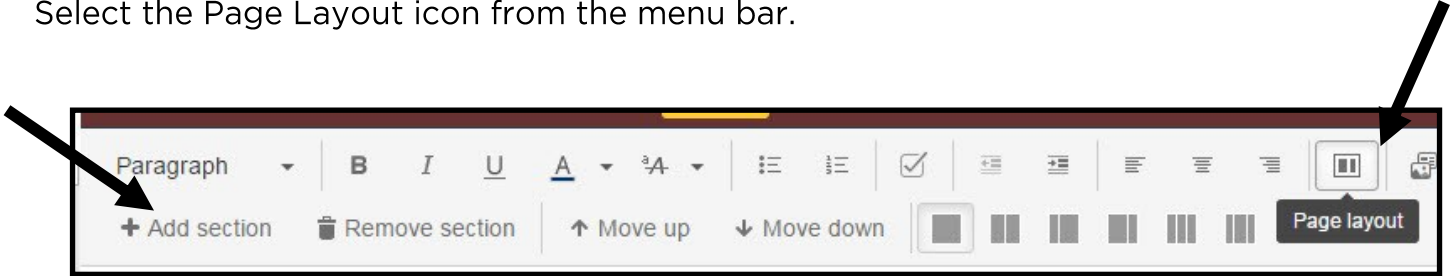


Name your page - "Blog Posts" by just typing over the words Page title.



Organize Blog Posts

Select the Page Layout icon from the menu bar.

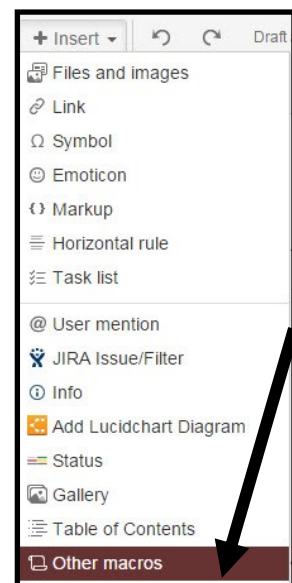
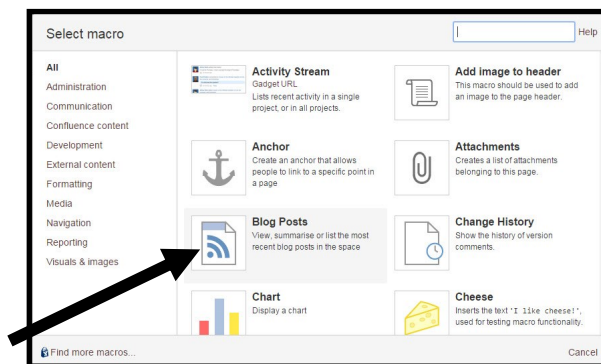


Add a new section on your page.



From the menu bar, select +Insert - Other macros

Select Blog Posts

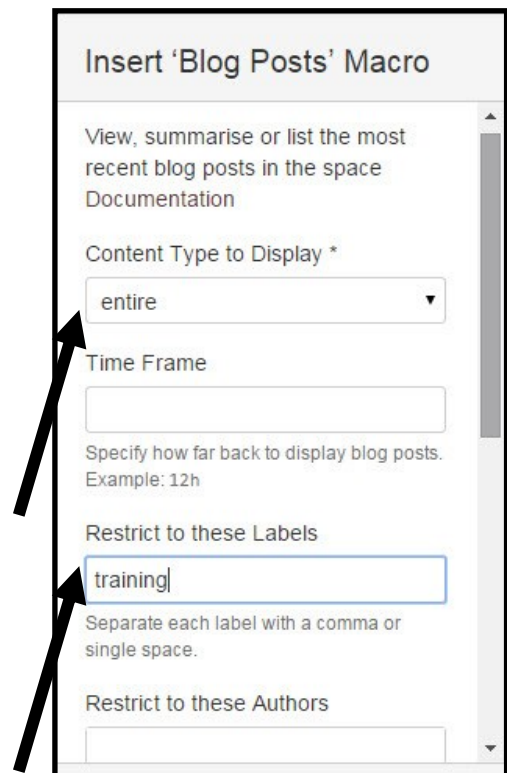


Organize Blog Posts

In Content Type to Display, select “entire” if you would like the whole blog post in the window.

Make sure you have a label on each blog post so you can filter by the labels.

In Restrict to these Labels, type the label you would like to show in this blog. For instance, if you want to restrict all this to training blogs, make sure the blogs have the label “training” and then type that label in this field.



Insert 'Blog Posts' Macro

View, summarise or list the most recent blog posts in the space
Documentation

Content Type to Display *

entire

Time Frame

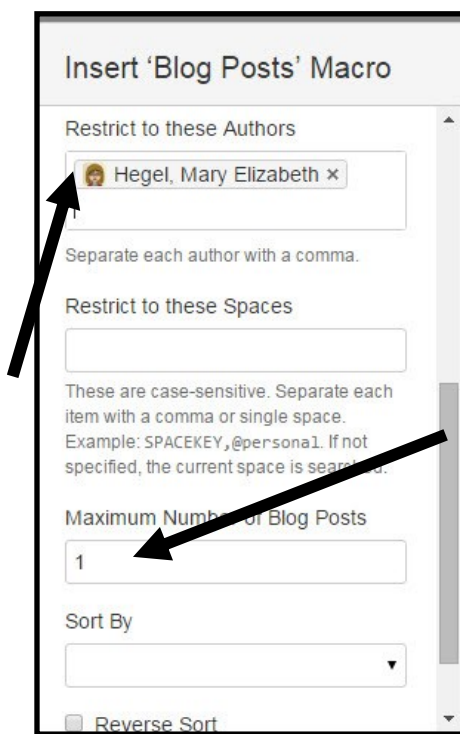
Specify how far back to display blog posts.
Example: 12h

Restrict to these Labels

training

Separate each label with a comma or single space.

Restrict to these Authors



Insert 'Blog Posts' Macro

Restrict to these Authors

Hegel, Mary Elizabeth x

Separate each author with a comma.

Restrict to these Spaces

These are case-sensitive. Separate each item with a comma or single space.
Example: SPACEKEY,@personal. If not specified, the current space is searched.

Maximum Number of Blog Posts

1

Sort By

☐ Reverse Sort

You can also restrict it by author and space if you wish. For instance, if you just want to show the Dean's messages, then restrict it to just her as the author.

For this section, we are just going to show a maximum of one blog, and the older ones will be in the archive in another section. You could show more than one blog if you wish, but don't show too many because that will make the page too long.

Organize Blog Posts

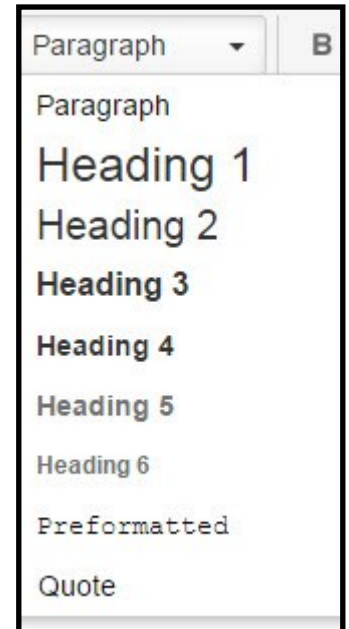
You will see that the blog posts will now be located in the first section.



Add another section.

In the new section, Type - "Archived Blog Posts".

Format it to Heading 2 (highlight the words, select Paragraph from the menu bar and then select Heading 2).



To enter the archived blogs in this section, under the title (Archived Blog Posts) Select Insert - Other Macros - Blog Posts.

Organize Blog Posts

For this section, we want to show all the blog posts ever created with a certain label by a certain person. For Content to Display, select “titles”. The reader can click on a title to read the whole document.

Content to Display: “titles”.

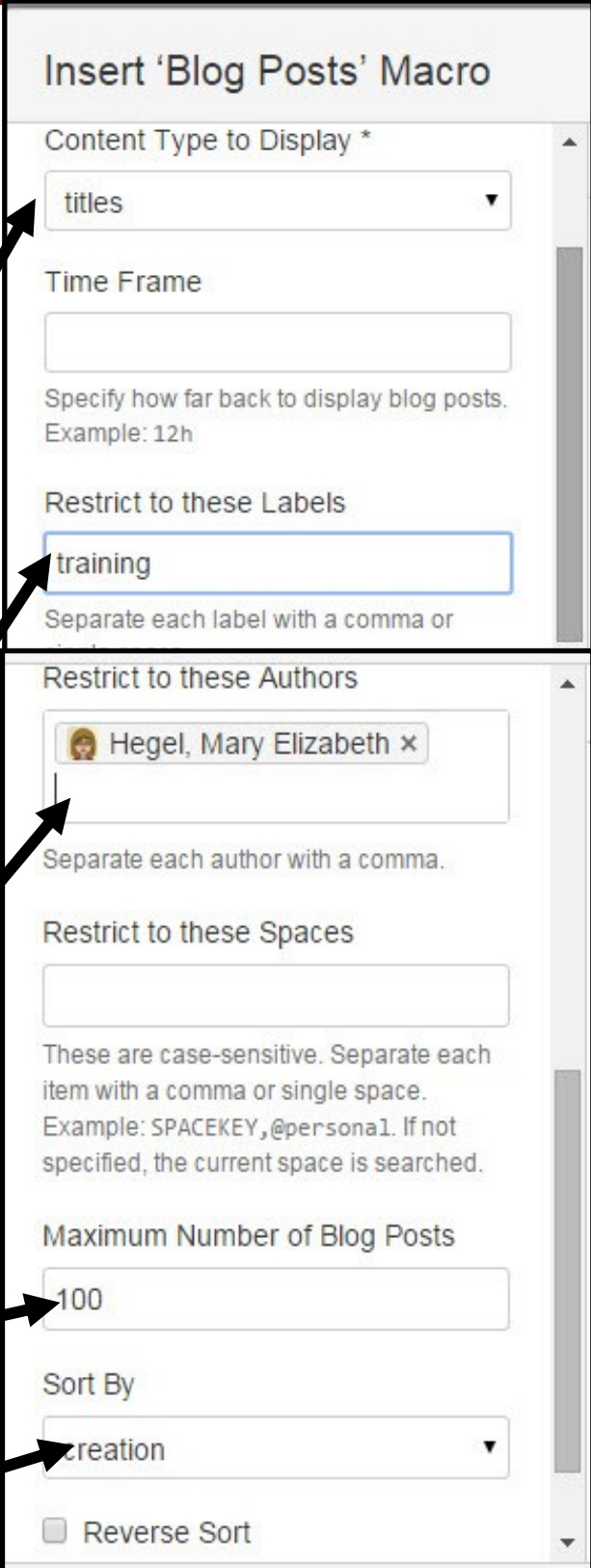
Restrict to these labels:
Type the label on your blog.

Restrict to these authors:
Type the name the author if applicable.

Maximum Number of Blog Posts:
Type the number you want to keep in archive.

Sort by:
Choose creation, title or modified.
Select Reverse order if you want the newest to show at the top of the list.

Select Insert from the bottom right side.



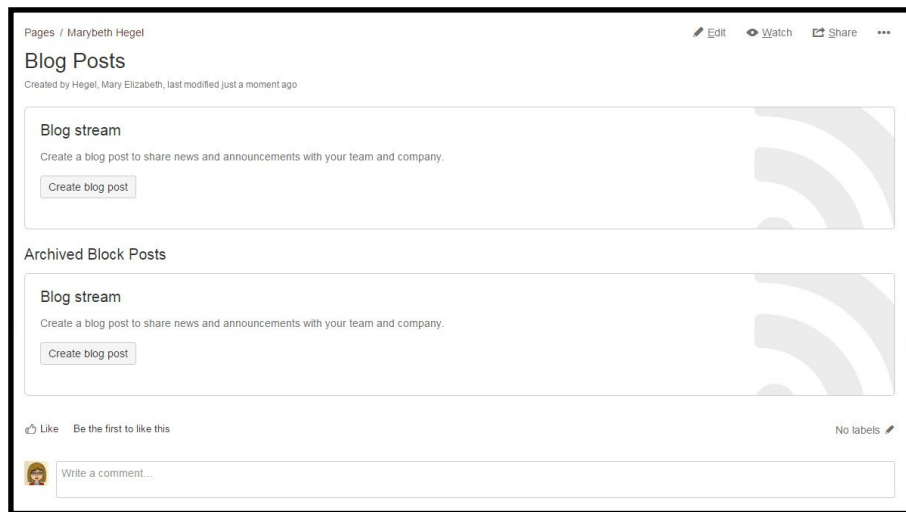
The image shows a 'Insert 'Blog Posts' Macro' dialog box with several sections. Arrows from the text on the left point to the following fields in the dialog:

- Content Type to Display ***: A dropdown menu with 'titles' selected.
- Time Frame**: An empty text input field.
- Restrict to these Labels**: A text input field containing 'training'.
- Restrict to these Authors**: A text input field containing 'Hegel, Mary Elizabeth' with a small profile icon and an 'x' to remove it.
- Maximum Number of Blog Posts**: A text input field containing '100'.
- Sort By**: A dropdown menu with 'creation' selected.
- Reverse Sort**: An unchecked checkbox.

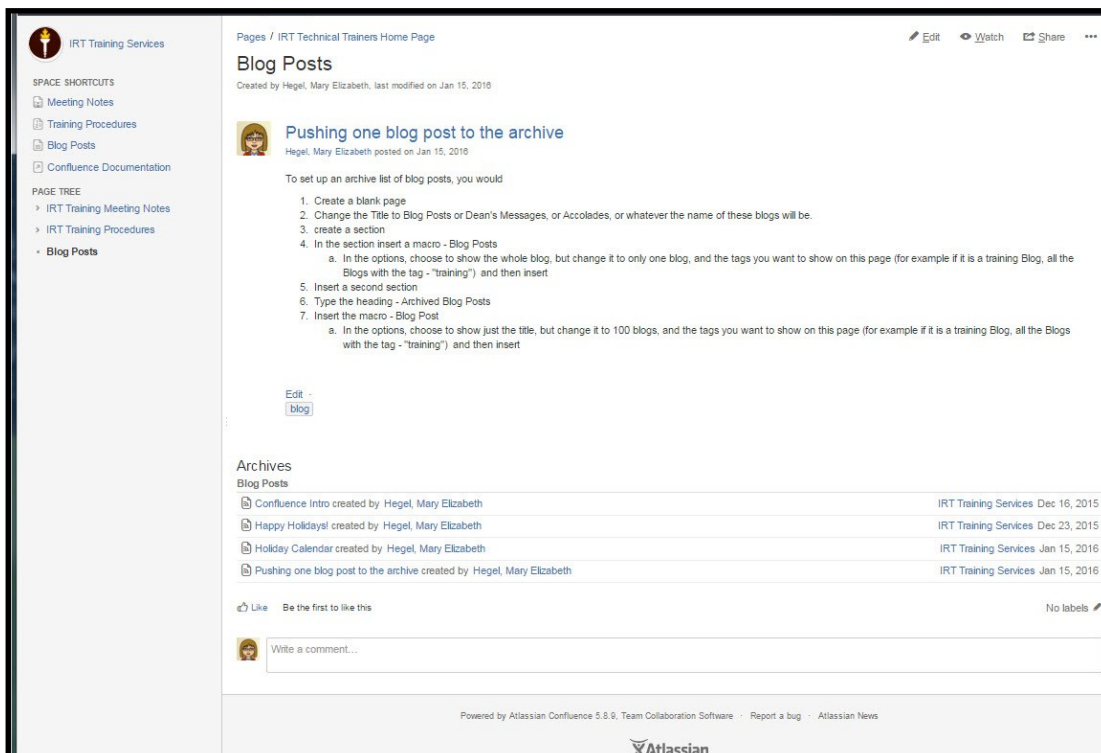
Other visible text in the dialog includes: 'Specify how far back to display blog posts. Example: 12h', 'Separate each label with a comma or', 'Separate each author with a comma.', 'Restrict to these Spaces', 'These are case-sensitive. Separate each item with a comma or single space. Example: SPACEKEY,@persona1. If not specified, the current space is searched.', and a vertical scrollbar on the right side.

Organize Blog Posts

Since you don't have any blogs yet, your page will look similar to this.



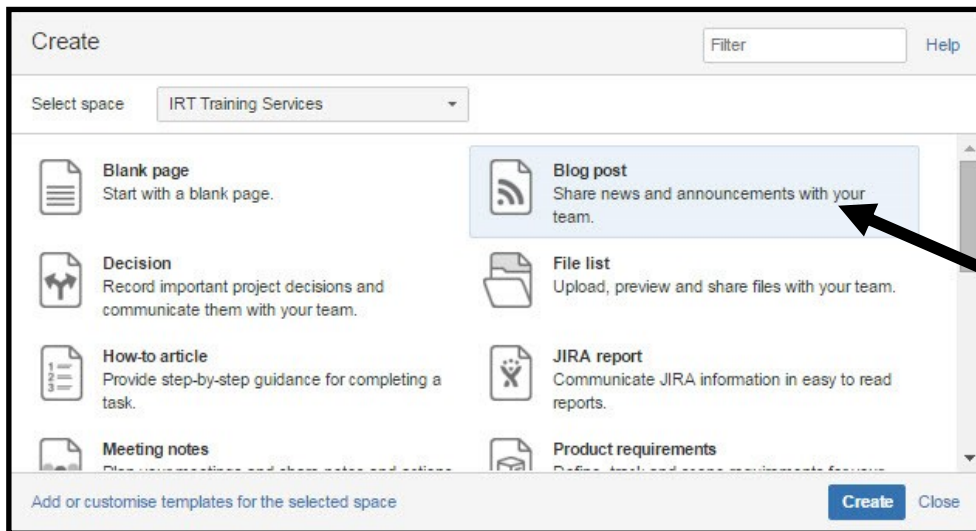
Once you start creating some blogs, the page will look more like this.



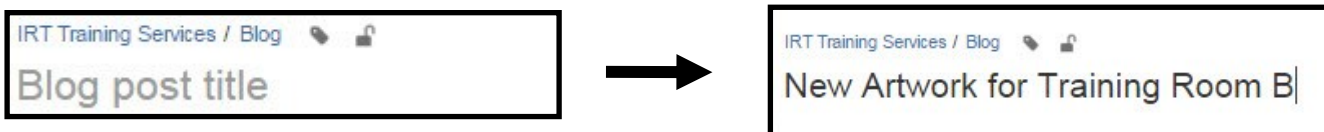
Create a Blog Post

Once you have the page set up to organize your blogs, you can start creating some posts.

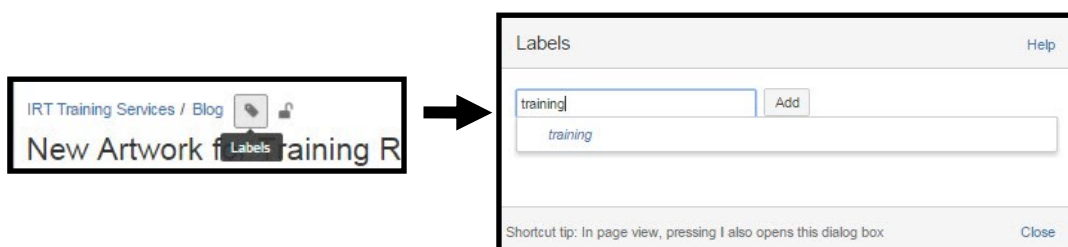
Select Create from the top menu bar, then select the Blog post template.



Create a title for the blog.



Tag it with a label (keyword) for these blogs and select Add. For instance, if this was a “accolades” blog, “accolades” would be the label, and then that blog would be grouped with all of the accolades blogs.



Publish.

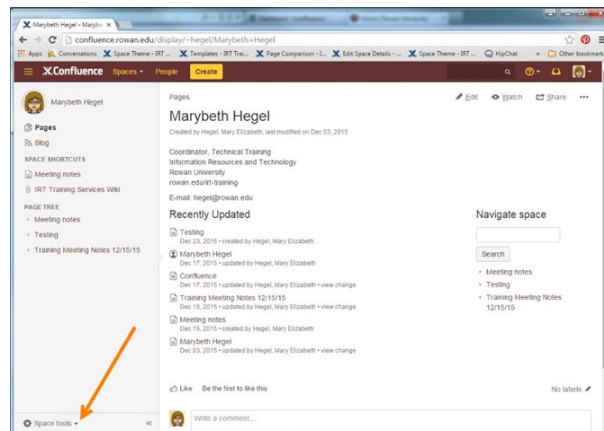
For Administrators - Space Tools

You can change the look and feel of the Space by selecting Space Tools from the bottom left side of the screen.

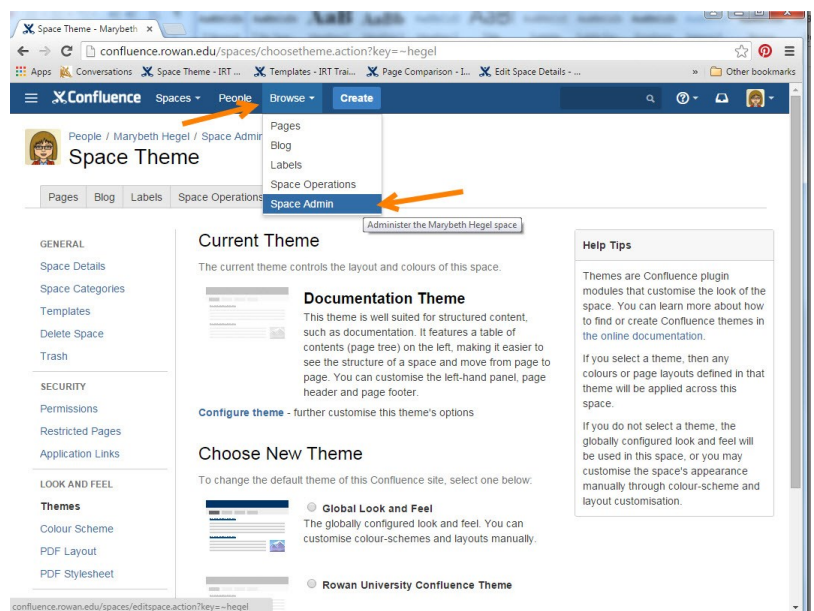
If you do not see the Space Tools, then your Space has the Documentation Theme. To get to Space tools in a Documentation Themed page select Browse from the top menu, and then Space Admin.

You may not see all the Space tools listed in this manual, depending on the permission level that was assigned to you. Even administrators have different levels of administrator rights.

Global Look and Feel
Themed Space - Space
tools at the bottom left.

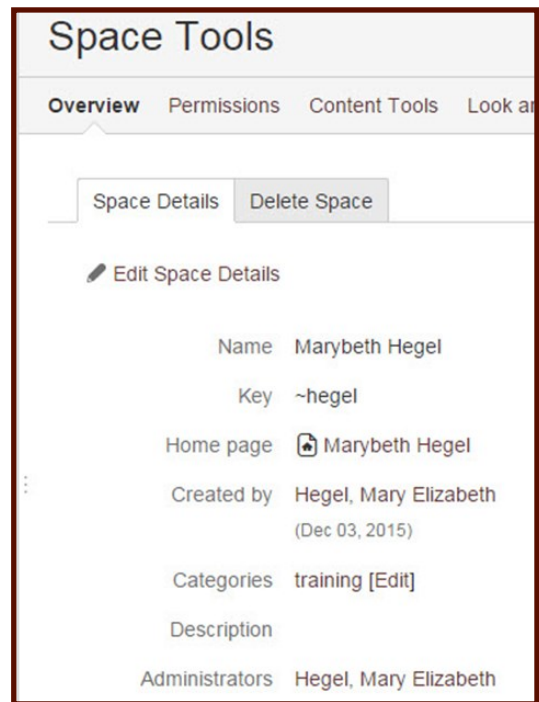


Document Themed
Space -
Space Admin under
Browse on the top
menu.

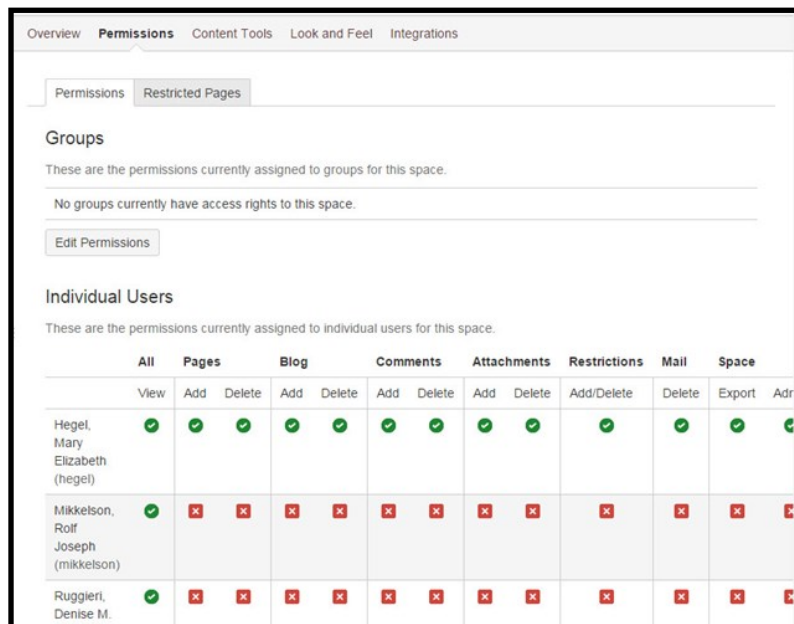


Overview and Permissions

In the **Overview** tab you can select Edit Space Details and then change the name of your space.



Permissions tab - select Edit Permissions and then choose who has access to your space, and what they can do.



Content Tools

In the **Content tools** tab you will see different options such as templates and reordering pages.

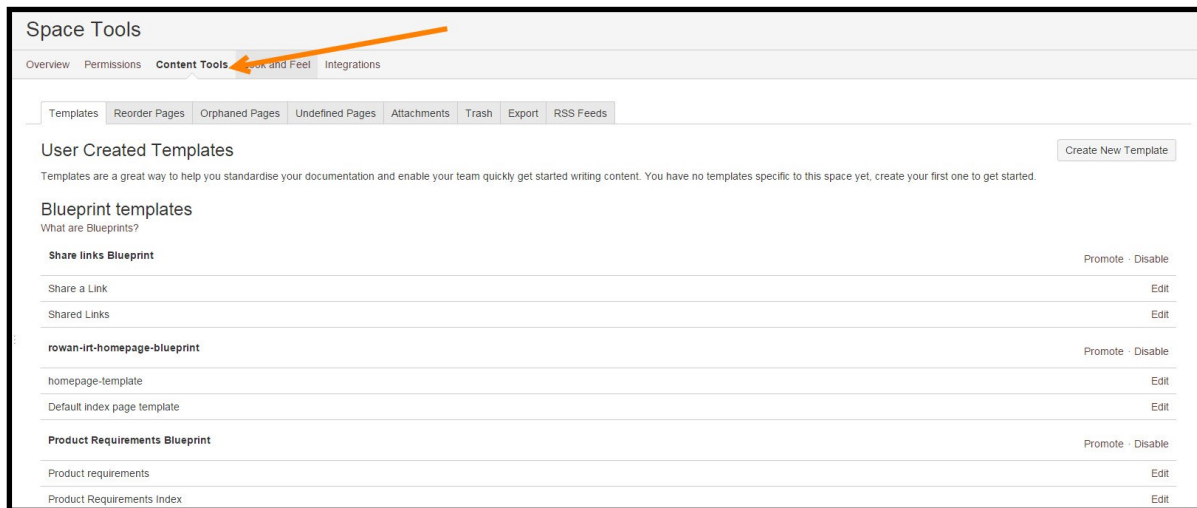
Templates - some page templates were created that you can use for your pages (such as notes and how-to lists).

Reorder pages - change parent/child order.

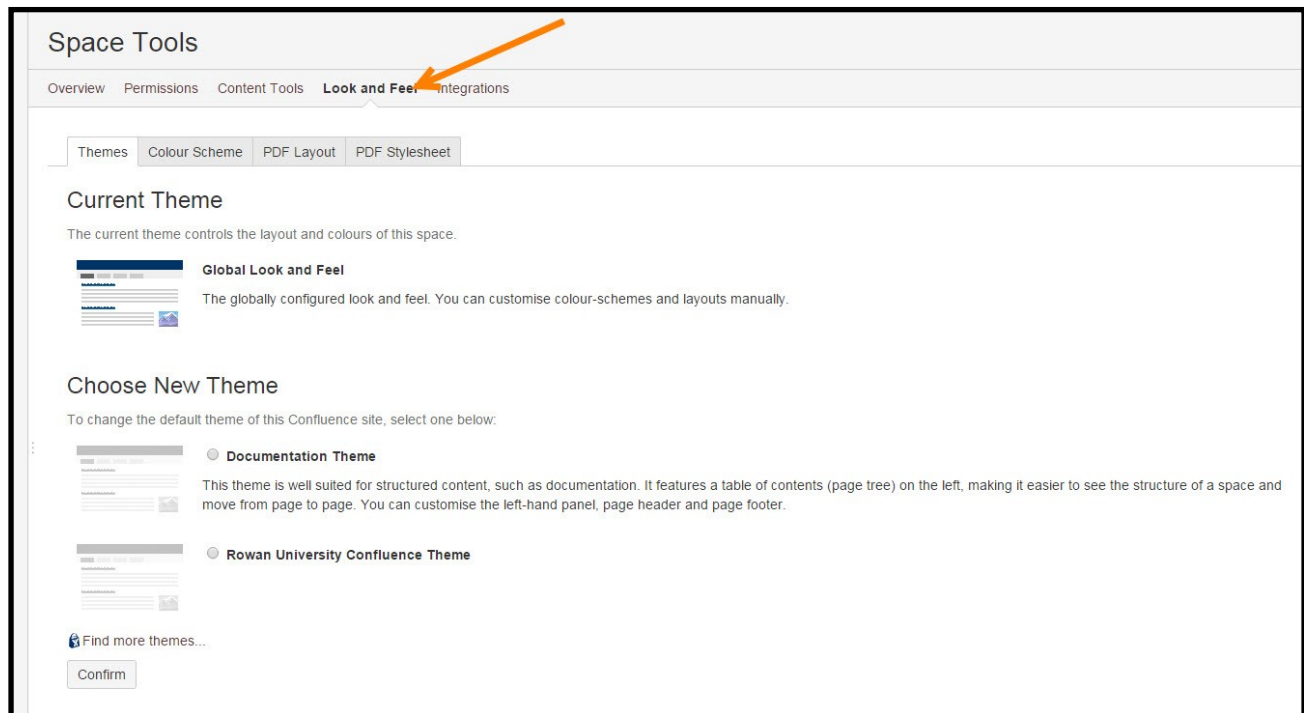
Orphaned pages - are not linked to any other pages in your space.

Trash - you can see pages that you have deleted and either restore them or purge them.

Export - export the space to pdf, HTML or XML.



Look and Feel



Currently there are three themes you can choose for your Space. Choose one for the Theme of your Space.

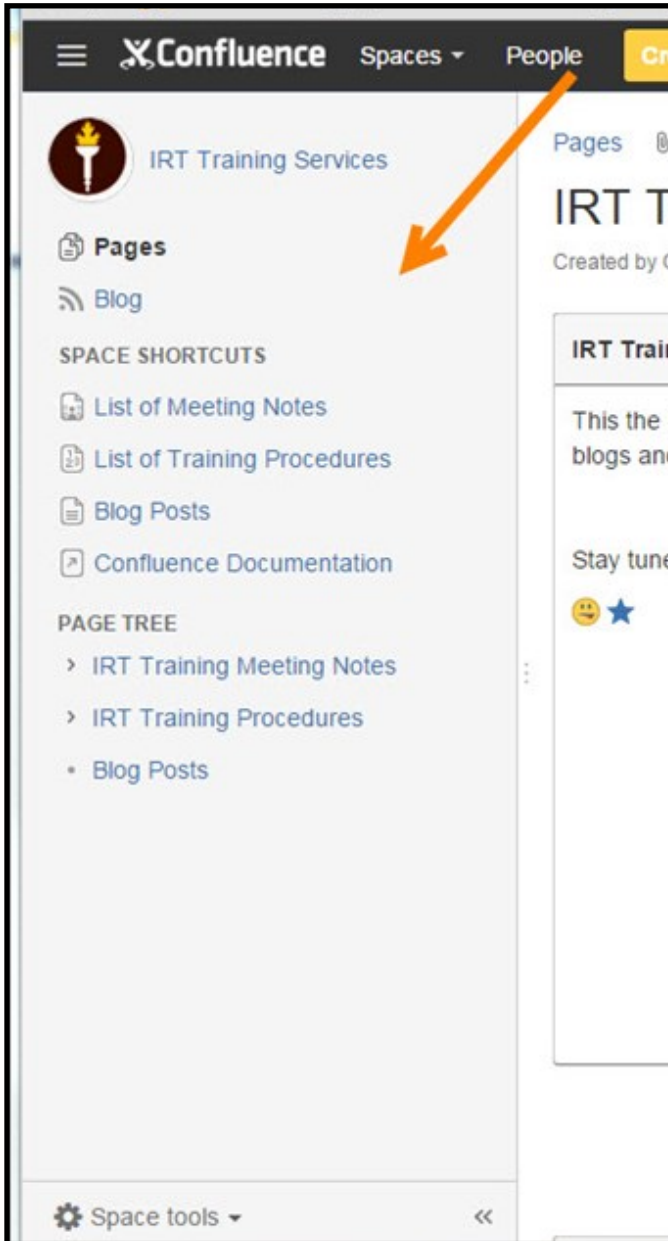
1. **Global Look and Feel** - This is the basic theme. You can customize colors to personalize the page. Select the **Color Scheme** tab, and then Edit under Custom Color Scheme to change the colors.

2. **Documentation Theme** - Select this theme if your space will consist of just documents. If you choose this one, your space tools will be located at the top menu, instead of at the bottom left side. See the next Section.

3. **Rowan University Confluence Theme** for it have a Rowan look like the IRT web page.

Select your Space name at the top of the left panel to return to your page.

Space Sidebar



The Space Sidebar is the left panel where you can find the content on your space.

Pages - see all the activity on the Space (a page is created for information that may change).

Blog - see news posted on the space (a blog is created for static information - news).

Space Shortcuts - quick links to important pages or links. When you select a Space shortcut, you will see the Page Tree below it.

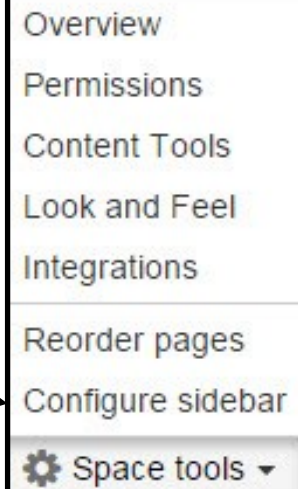
In the Page Tree section, you will see all the parent pages. Select the plus sign "+" to expand the parent page to see the child pages.

Space Shortcuts

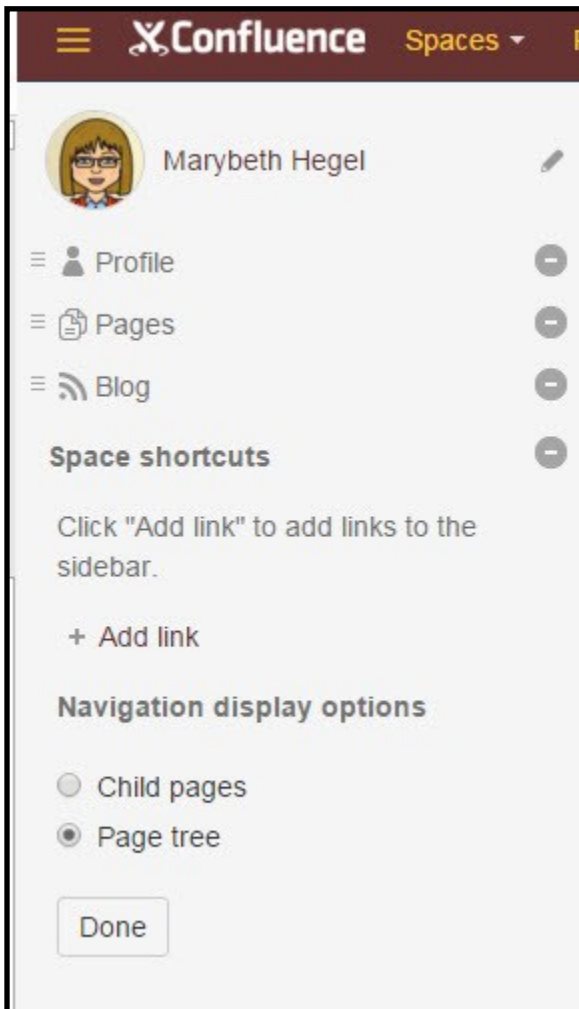
You can customize the sidebar and create space shortcuts.

Select Space Tools.

Select Configure Sidebar.



Overview
Permissions
Content Tools
Look and Feel
Integrations
Reorder pages
Configure sidebar
⚙ Space tools ▾



You can hide what you don't need by selecting the minus sign "-".

Drag and drop the items to reorganize them on the panel.

In Space Shortcuts, you can also add links to other pages in your space or other spaces or on the Web.

If you select Page tree in the navigation options the parent pages on your space will appear. Select the plus sign "+" to expand the parent page to see the child pages.

Resources

Confluence Dashboard

Log in with your Rowan network id and password.

<http://confluence.rowan/edu>

Confluence Tutorials and Documentation

(for Confluence Server 5.8)

This tutorial aims to get you acquainted with the Confluence user interface, and show you how and where to perform some common tasks

<http://tinyurl.com/zznsmua>

Installing and Administering Atlassian Confluence

This lynda.com tutorial starts with information about installing Confluence. Skip down to part 3 to learn about navigating and customizing Confluence.

<http://tinyurl.com/zc2y8vd>