Confluence Essentials Course

Objectives

- Learn how to format content in a page
- Understand the available macros and apply them to a page
- Use template and blueprints

Create & Format Content

- Confluence page content can be formatted using Rich Text Format.

- Macros allow for enhanced formatting capabilities. Some options include:
  - Rich-Text Features
    - Organizing content in sections
    - Adding headers, format text, bullet lists
    - Adding emoticons
    - Adding tables
  - Macros
    - Adding task list
    - Adding Jira issues
    - Attachments macro
    - Labels macro
    - Linking to pages or files

Page Design
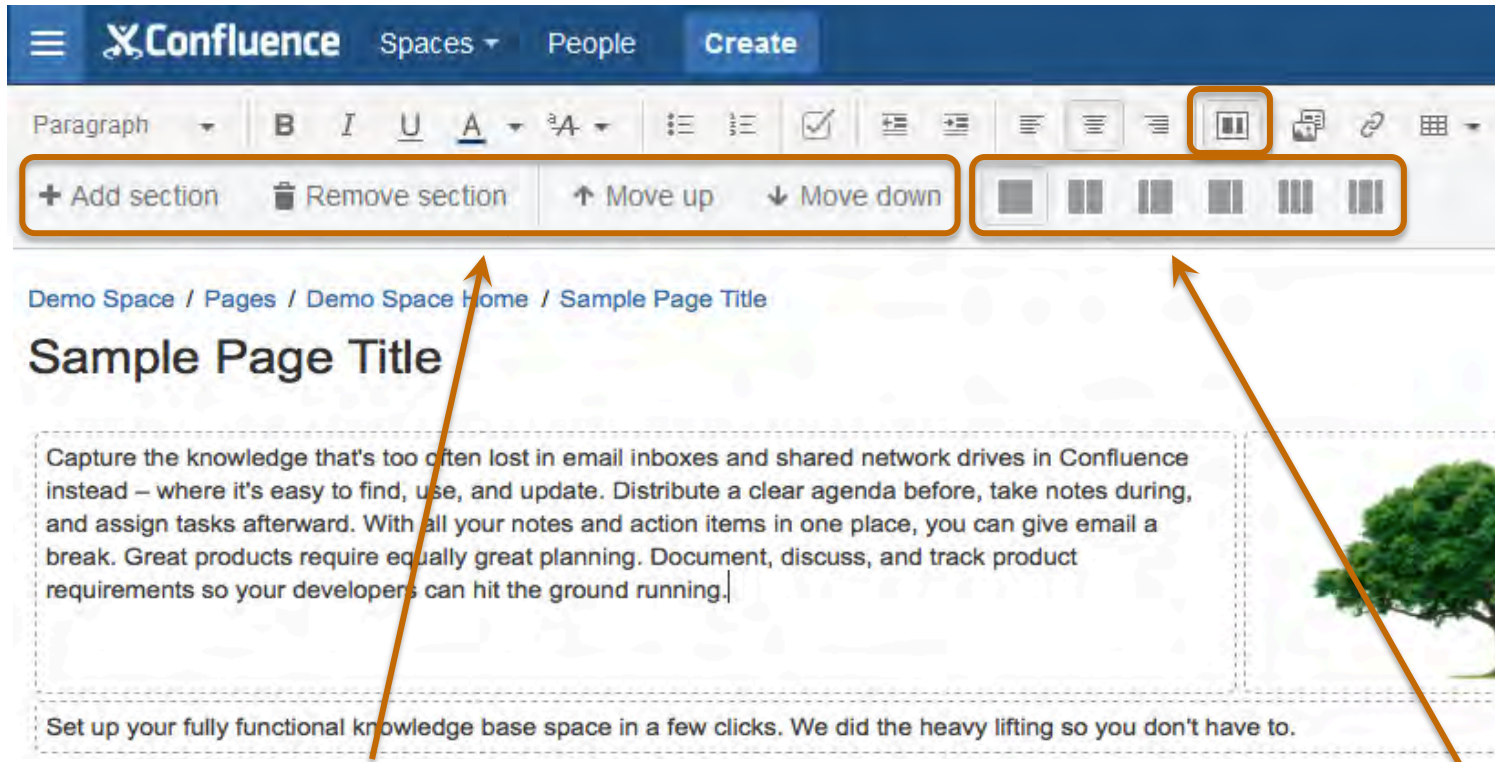
- Organize content by sections.
- Each row is a new section.
- Sections can be moved up/down or deleted.

Break sections into columns – 1, 2, or 3 columns
Indented left or right

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Format Text and Content

X Confluence | Spaces ▾ | People | **Create**

Paragraph ▾ | **B** *I* U A ▾ ³A ▾ | ≣ ≣ ☑ ⯈ ⯇ ☰ ☰ ☰ | ▥ | 🗗 🔗 ▦ ▾ + ▾ | ↶ ↷ | Draft aut

Paragraph menu:
- Paragraph
- Heading 1
- Heading 2
- **Heading 3**
- **Heading 4**
- **Heading 5**
- Heading 6
- Preformatted
- Quote

Organize content with headings and paragraphs.

Font menu:
- Strikethrough
- Subscript
- Superscript
- Monospace
- Clear formatting

Format font appearance and color.

Add bullets, number list, checkboxes, and indent or justify text.

Insert menu:
- Files and images
- Link
- Symbol
- Emoticon
- Markup
- Horizontal rule
- Task list
- @ User mention
- JIRA Issue/Filter
- Info
- Status
- Gallery
- Table of Contents
- Other macros

Insert files, images, links, tables or other content.

… and of course you can undo or redo any changes
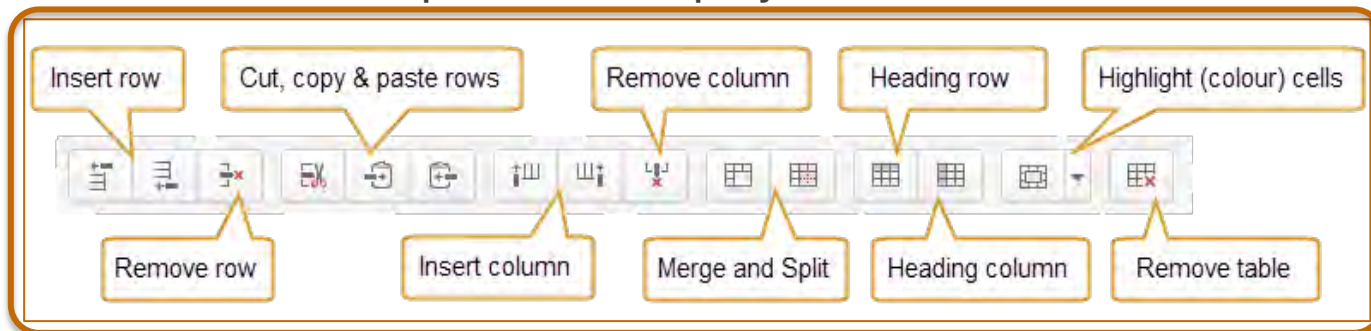
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Format Tables

Select Tables dropdown and configure table with needed rows and columns
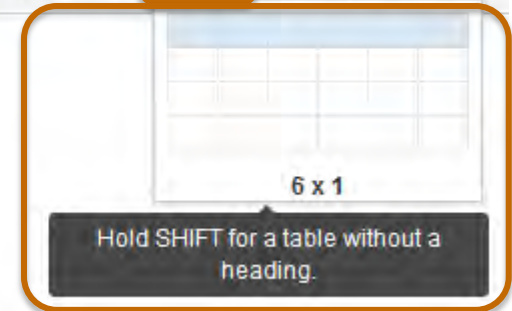
Tool bar for Tables operations displays when Tables are selected

Add Links

Select Link to add links to attached files, Confluence page links, or other web links.

1

2

Browse and upload or select from listed files

Select link type (File or URL)

Insert link   Help

Search
Recently viewed
Attachments
Web link
Advanced

Link to a file that is attached to this page or attach a new one.

Upload file [   ] Browse...

Name	Size	Comment
iHealth SD Worklfow.png	157 kB	GLIFFY IMAGE
iHealth SD Worklfow	73 kB	GLIFFY DIAGRAM
Client Inquiry_POC_CPI Workflow_v2.vsd	143 kB	
CIP Workflow Whiteboard.JPG	574 kB	
CIL Workflow - Medical Policy.JPG	1.46 MB	
CIL Workflow -- Operations.JPG	1.58 MB	
Client Inquiry Research Request Wokflow.JPG	1.54 MB	
Report Request Wofklow.JPG	1.58 MB	

Enter link text to display hyperlink

Link text iHealth SD Worklfow.png   ×
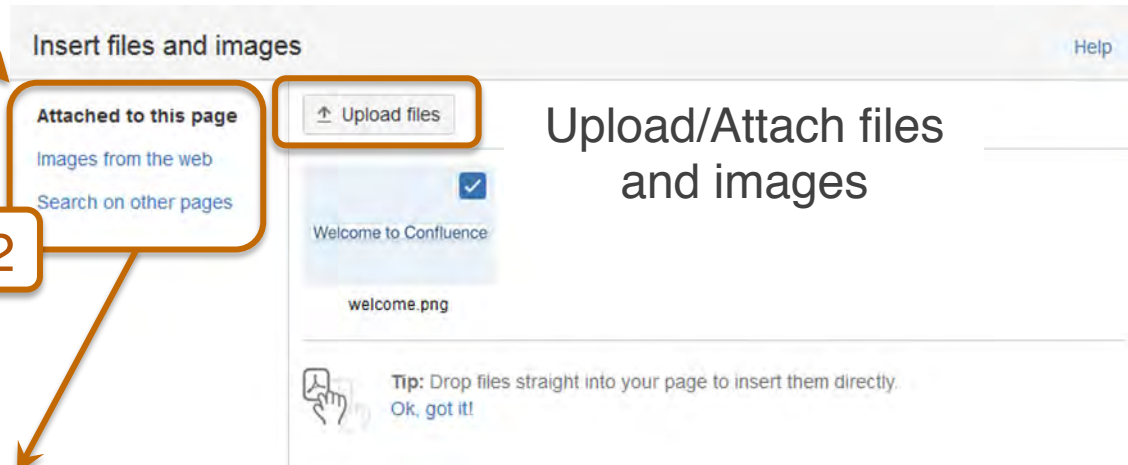
a list of suggested pages and insert a link.   Insert   Cancel
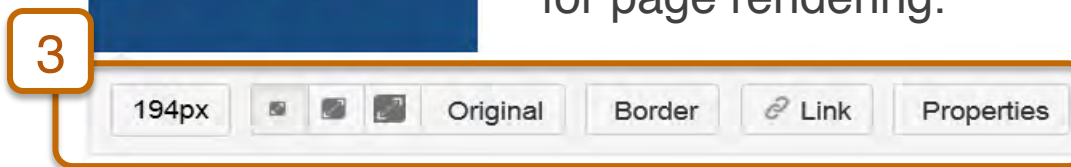
Shortcut Tip: Press [

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Add Embedded Images

Select Files and Images source to embed on page

Upload/Attach files and images

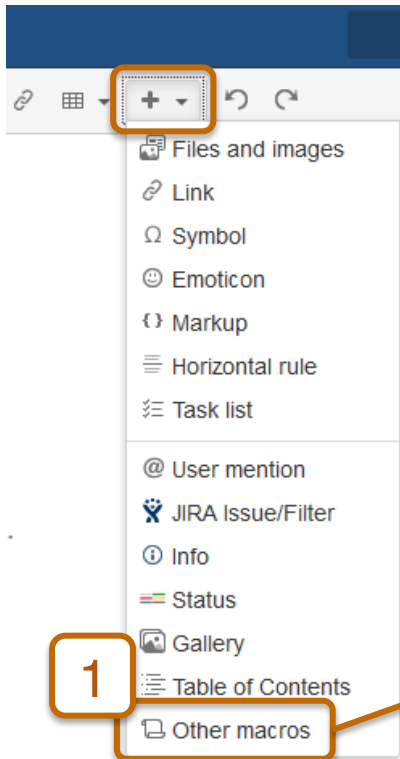Define size, border, and other properties for page rendering.

1

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Insert files and images — Help

Attached to this page
Images from the web
Search on other pages

⬆ Upload files

Welcome to Confluence

welcome.png

Tip: Drop files straight into your page to insert them directly.
Ok, got it!

194px | Original | Border | 🔗 Link | Properties

Add Emoticons

Select Emoticon from Insert (+) dropdown
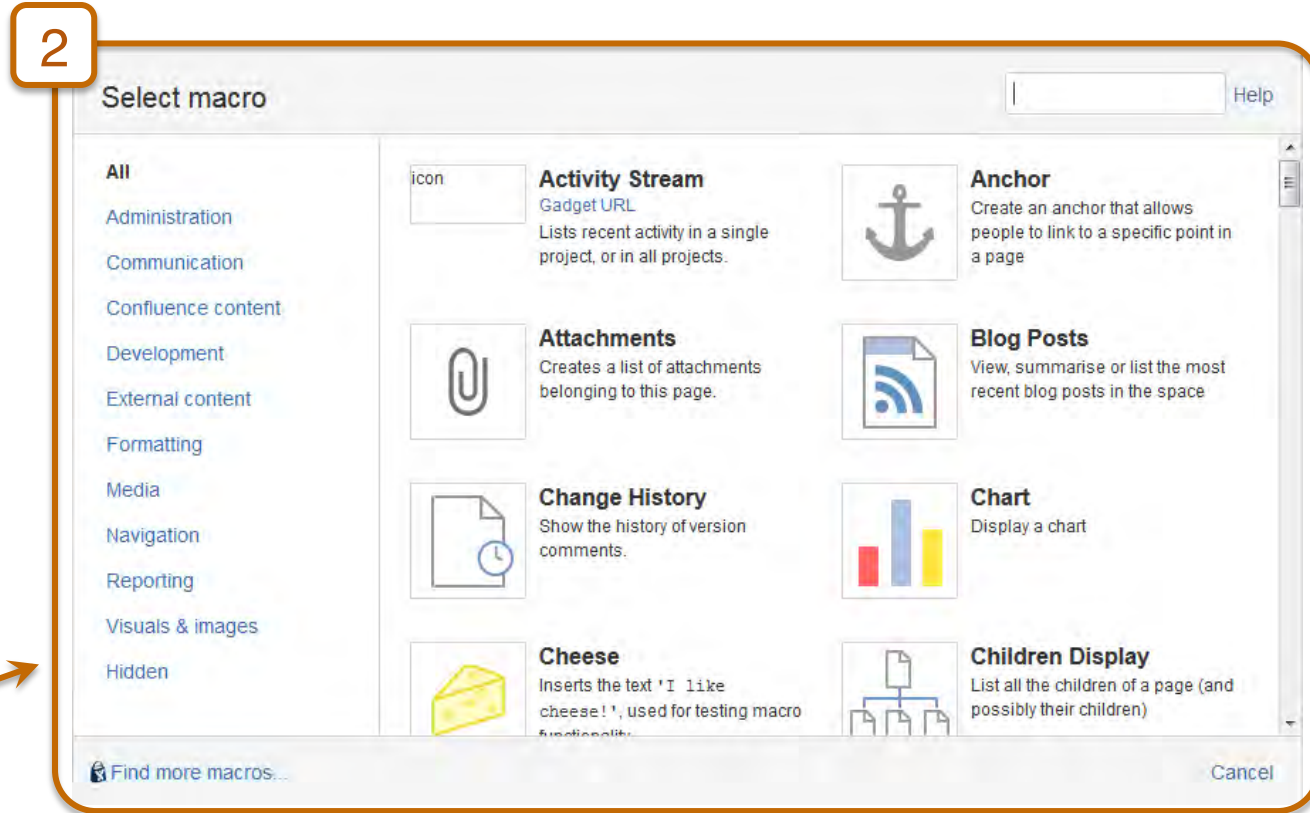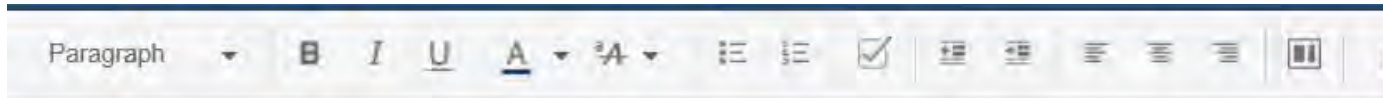
Choose from available options

Insert Macro Browser

View full list of available macros

Browse, search, and select from the available list to insert macro of interest on the Confluence page
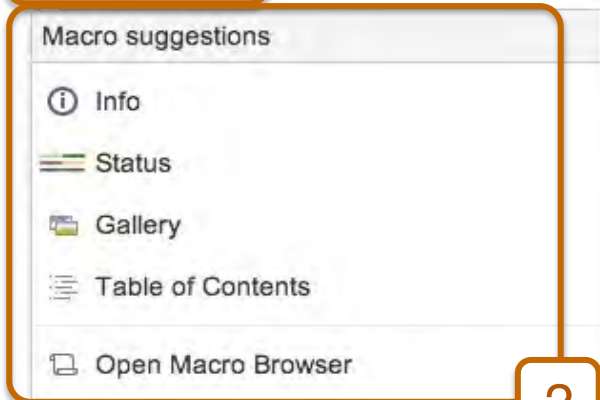
Macro Autocomplete

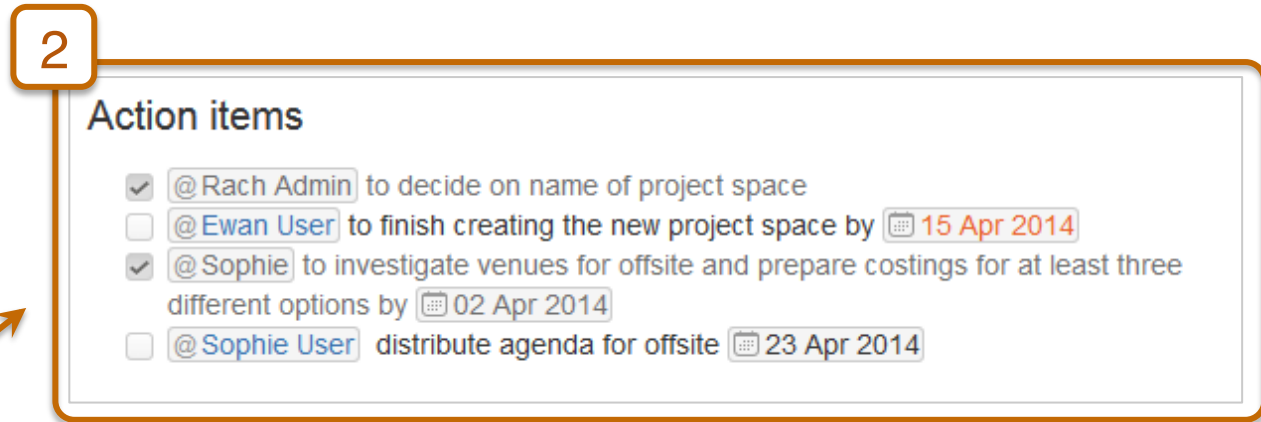
Type Shortcut "{" to find and autocomplete macro list

Select from the list of suggested macros to insert on Confluence page

Task List Macro
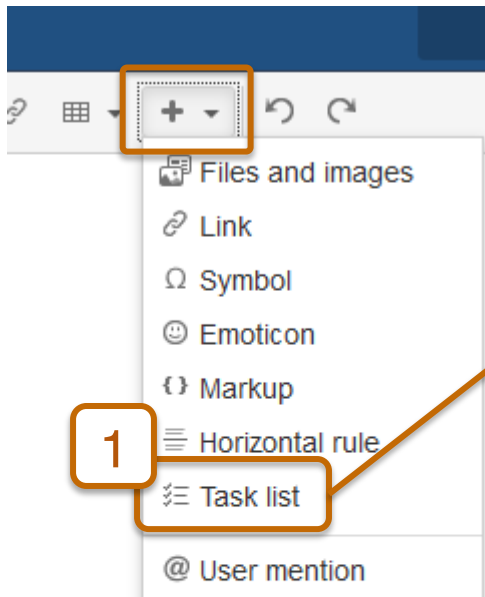
1 Select Task List to start building task list on page

2 Action items
- ✓ @Rach Admin to decide on name of project space
- ☐ @Ewan User to finish creating the new project space by 📅 15 Apr 2014
- ✓ @Sophie to investigate venues for offsite and prepare costings for at least three different options by 📅 02 Apr 2014
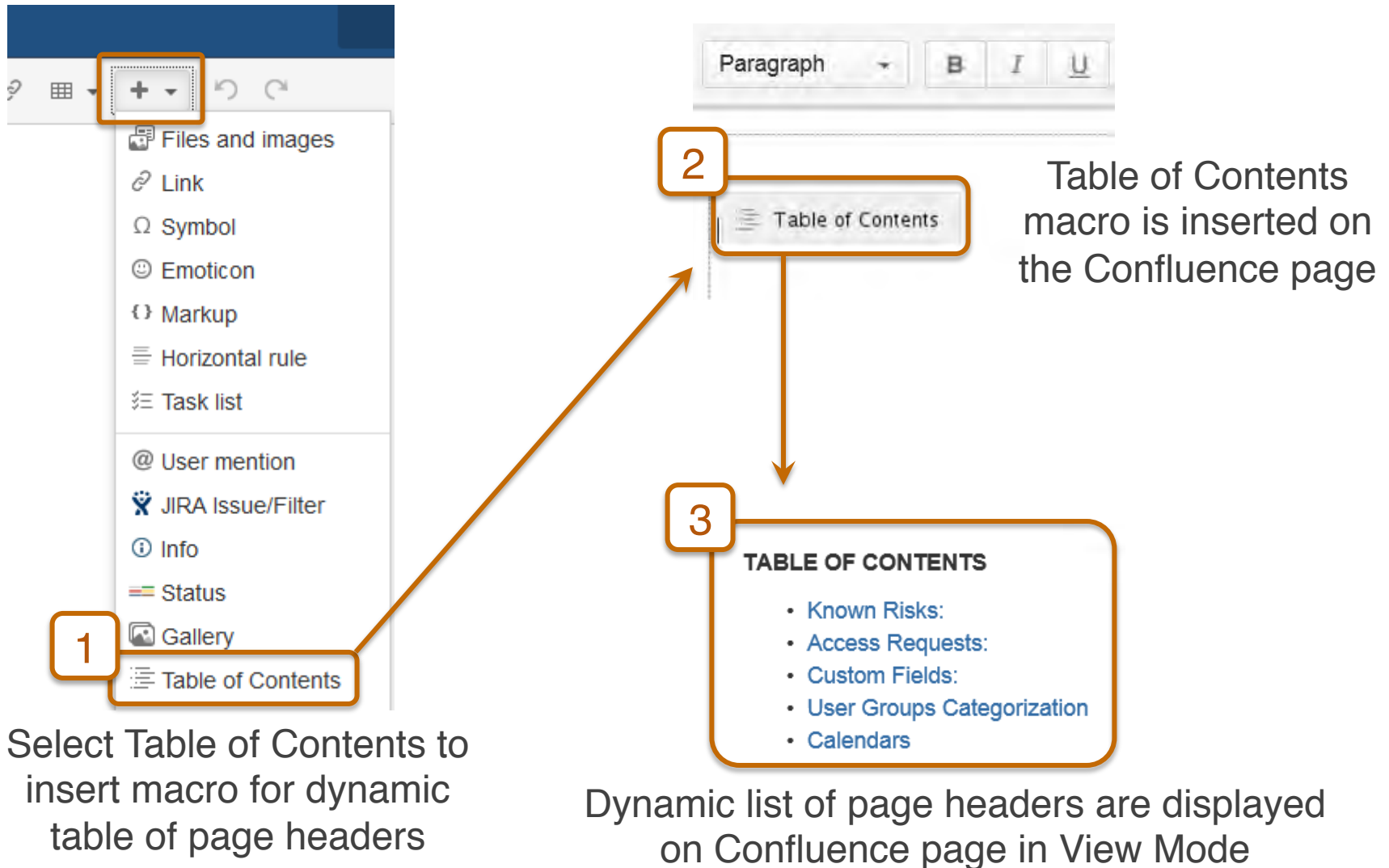- ☐ @Sophie User distribute agenda for offsite 📅 23 Apr 2014

Build a task list
- Assign owners
- Add task details
- Set due dates for tasks
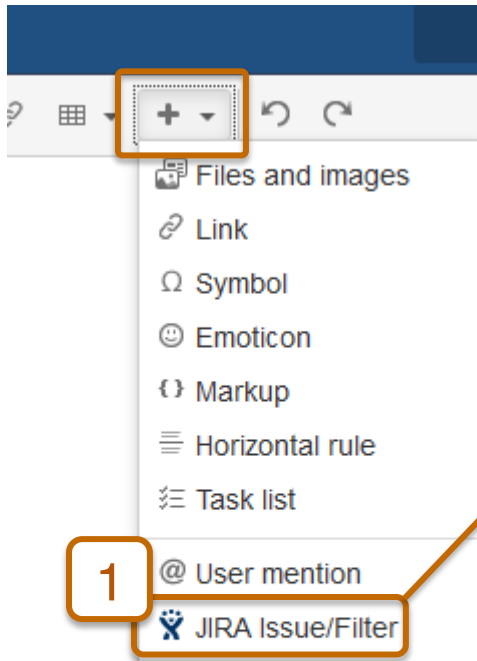- Use @mentions to notify owners
- Check off tasks when done

Due dates will turn **ORANGE** if nearing due date and **RED** when past due

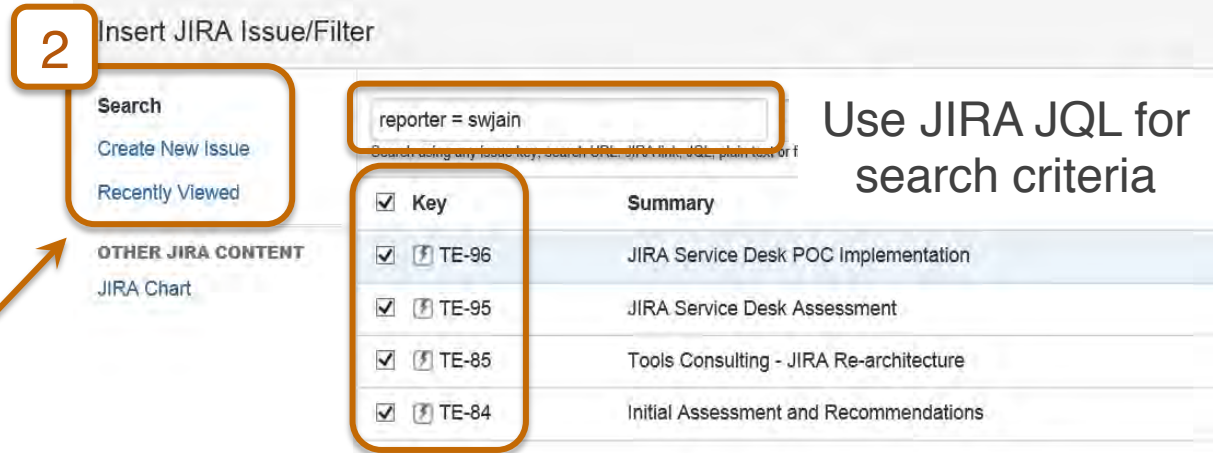CPRIME

Table of Contents Macro

Select Table of Contents to insert macro for dynamic table of page headers

Table of Contents macro is inserted on the Confluence page

Dynamic list of page headers are displayed on Confluence page in View Mode

JIRA Issues Macro

Select options to find or create JIRA issue(s)

Use JIRA JQL for search criteria
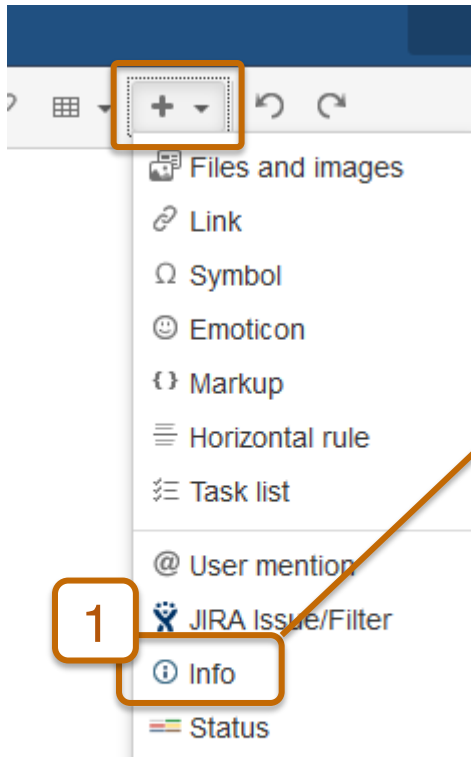
Select JIRA Issue/Filter to insert an issue or list of issues.

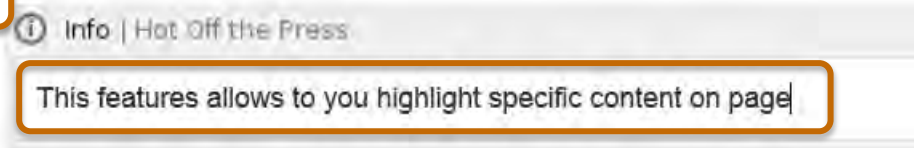Find and select issues to be inserted on Confluence page

Info Boxes Macro

Insert 'Info' Macro

Highlights content as an informational note with a blue background.

Optional Title
Hot Off the Press

☑ Show Information Icon

Enter title (optional)

2

↻ Preview

ⓘ **Hot Off the Press**

Refresh Preview to view title and info icon (if selected)

Files and images
Link
Ω Symbol
☺ Emoticon
{} Markup
≡ Horizontal rule
≝ Task list

@ User mention
JIRA Issue/Filter
ⓘ Info
Status

1

Select macro   Insert   Cancel

Select Info to create a framed section on Confluence page

Type within frame to highlight content

3

ⓘ Info | Hot Off the Press

This features allows to you highlight specific content on page

Attachments Macro

1 Access macros by entering the { key

Find the Attachments macro through autocomplete or macro browser

Refresh Preview to see attachments matching filter criteria

2 Edit 'Attachments' Macro

Filter the attachments shown by filename

Working with Labels Macro

{ label

Macro suggestions

1

📄 Content by **Label**

📊 **Labels** Gadget

Labels List

📄 Popular **Labels**

Recently Used **Labels**

🏷️ Related **Labels**

📋 Open macro browser

Find Content by Label
through autocomplete
or macro browser

Refresh Preview to see content
matching filter criteria

Insert 'Content by Label' Macro

2

List the pages labelled by a specified
set of labels. Documentation

Label(s) *

jira

Include only pages tagged with these
labels. Separate each label with a comma
or single space.

Author(s)

Include pages created or modified by these
authors. Separate each author with a
comma.

Include this Content Type Only

Examples: page or blogpost. If not
specified, all content types are included.

🔄 Preview

📄 Replicon Migration (Tools)
  jira   rally   migration   kb-how-to-article

📄 High-level Outline for JIRA & JIRA Agile Demos (Tools)
  jira   jira_agile   demo

📄 Atlassian JIRA 6.4 API (Scott Worley)
  shared-links   api   jira

📄 Jira DataBase Schema (Scott Worley)
  shared-links   schema   jira   database

📄 JIRA 5.x Development Cookbook - Free Download eBook - pdf (Scott Worley)
  shared-links   jira   development

📄 Thermo-Fisher Migration Plan (Engagements)
  migration   kb-how-to-article   ubuntu   postgresql   linux   thermo-fisher
  life   jira   confluence

Insert   Cancel

List of options to narrow
down Content by Label
criteria – label name,
author, page or blog, etc.
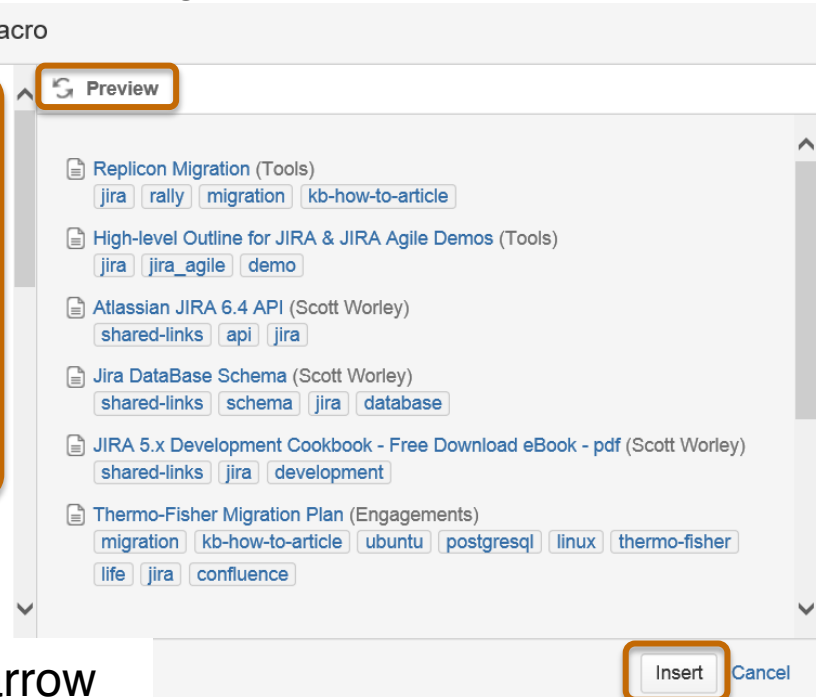
Insert displays
labels

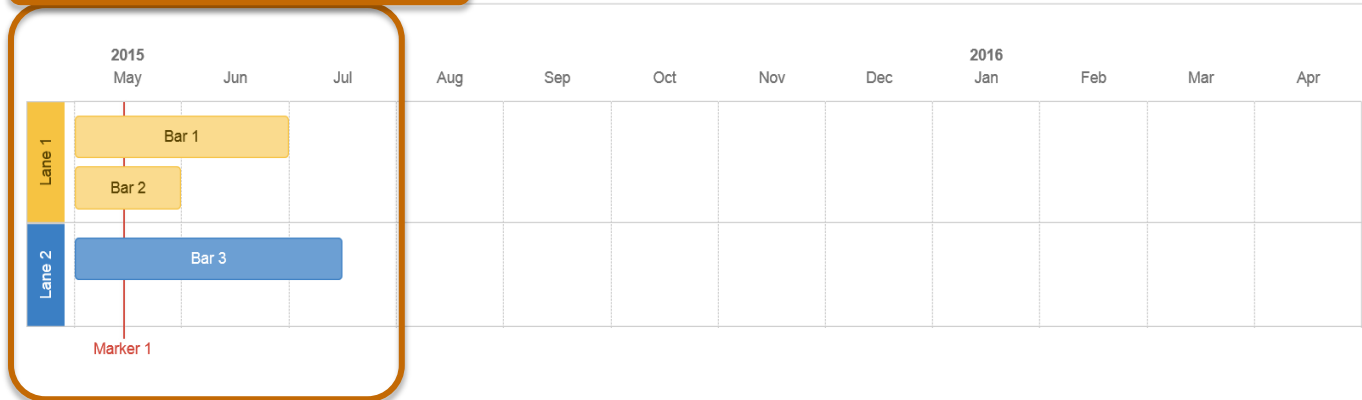**CPRIME**

Working with Roadmap Planner Macro

Add Roadmap Planner macro through autocomplete or macro browser

- Add lanes, bars, and/or mile markers as needed
- Click on any box to edit title or color, or delete
- Drag to move around on the timeline bar
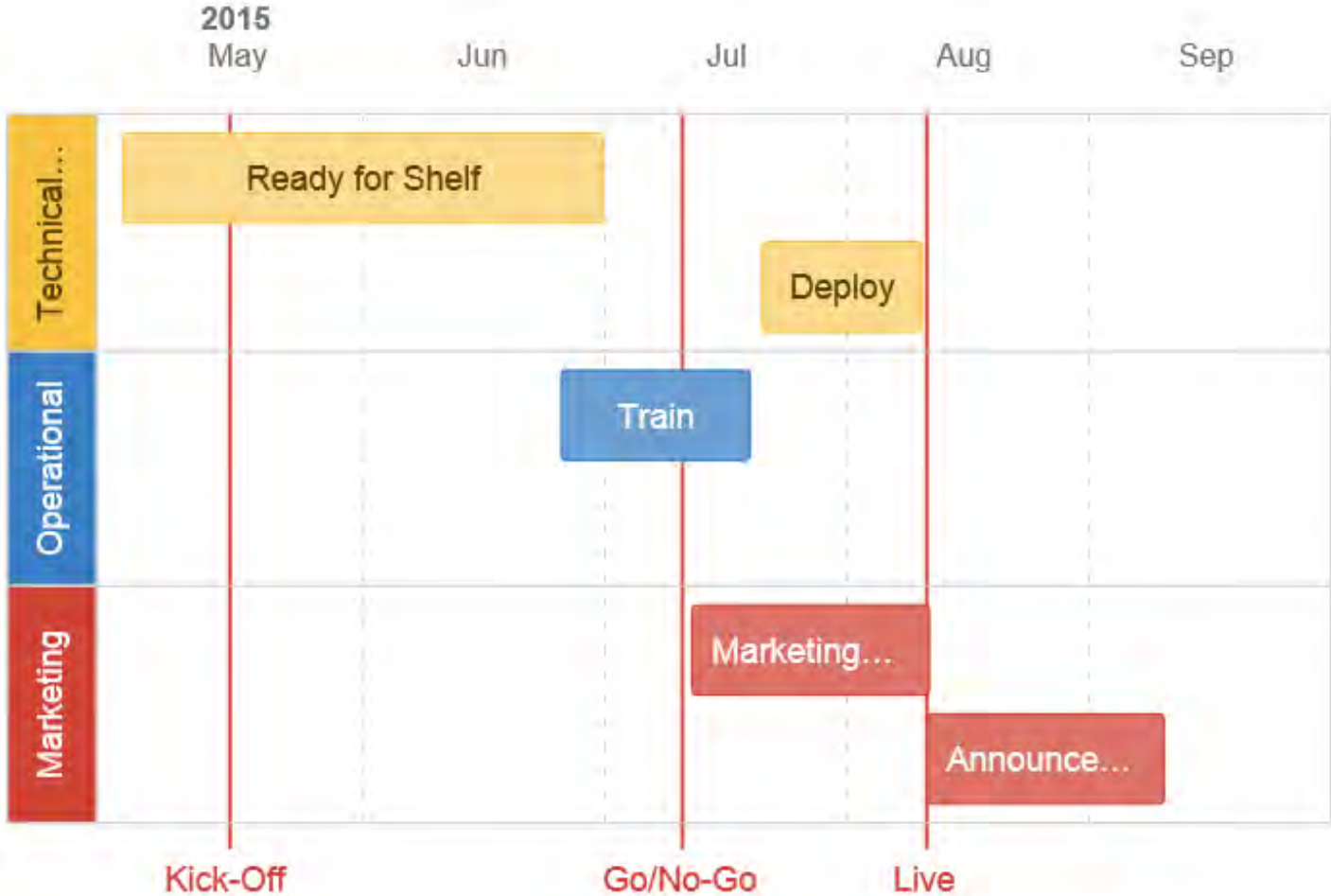- Choose Settings to change timeline of the roadmap
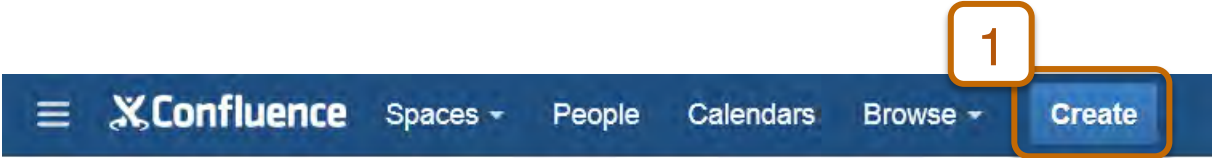
Sample Roadmap

Demo

- Page design
- Formatting Pages and content
- Adding links, images, and emoticons
- Using Macros

Templates Introduction

- Pre-defined structure that gives a starting point to page content
  - User can start with a blank or structured template
  - User can modify body of the template when creating page
  - Once page is created, template is no longer linked to the page

- Useful tool to set guidelines and promote standards on team documentation

- Templates can be local to Confluence project space or global to the entire application

Using Templates
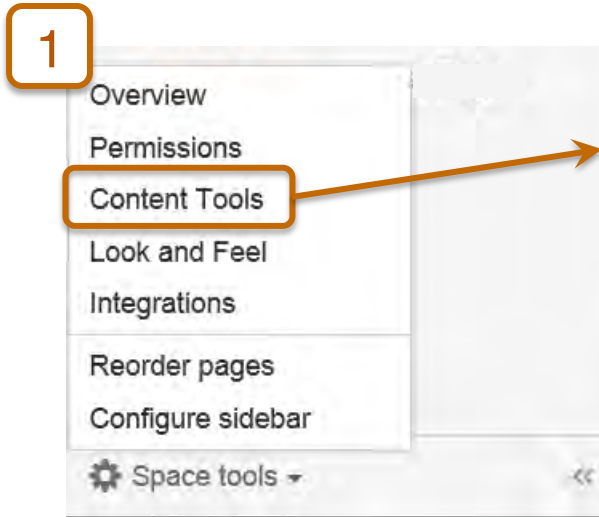

Select space in which to create page
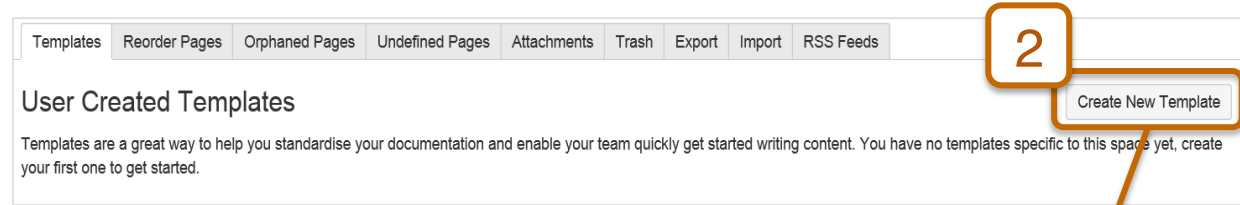
Search for available templates

Select template

Types of Templates

- Global Templates vs. Space Templates
  - Global templates can be created by Confluence administrators only, using Confluence Administration Console
  - Space templates can be created by space administrators only, using Space Tools Console

- Templates promoted in the space take precedence over global and blank templates in the template selection box
  - Global templates can be accessed by using Show More link

Create and Promote Space Templates

1 Overview
Permissions
Content Tools
Look and Feel
Integrations

Reorder pages
Configure sidebar

⚙ Space tools ▾

Select Content Tools
from the left rail
Space Tools bar

2

| Templates | Reorder Pages | Orphaned Pages | Undefined Pages | Attachments | Trash | Export | Import | RSS Feeds |

User Created Templates   Create New Template

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

- Select Create New Template from the Templates tab
- Fill out blank page with intended page structure and Save

3

| Templates | Reorder Pages | Orphaned Pages | Undefined Pages | Attachments | Trash | Export | Import | RSS Feeds |

User Created Templates   Create New Template

Name	Description	Last Updated By	Updated	Operations
Scope	No description ✏	cPrime Administrator	May 29, 2015	Promote · Edit · Delete

Template shows
in the list of available
space templates

Click Promote to
make space
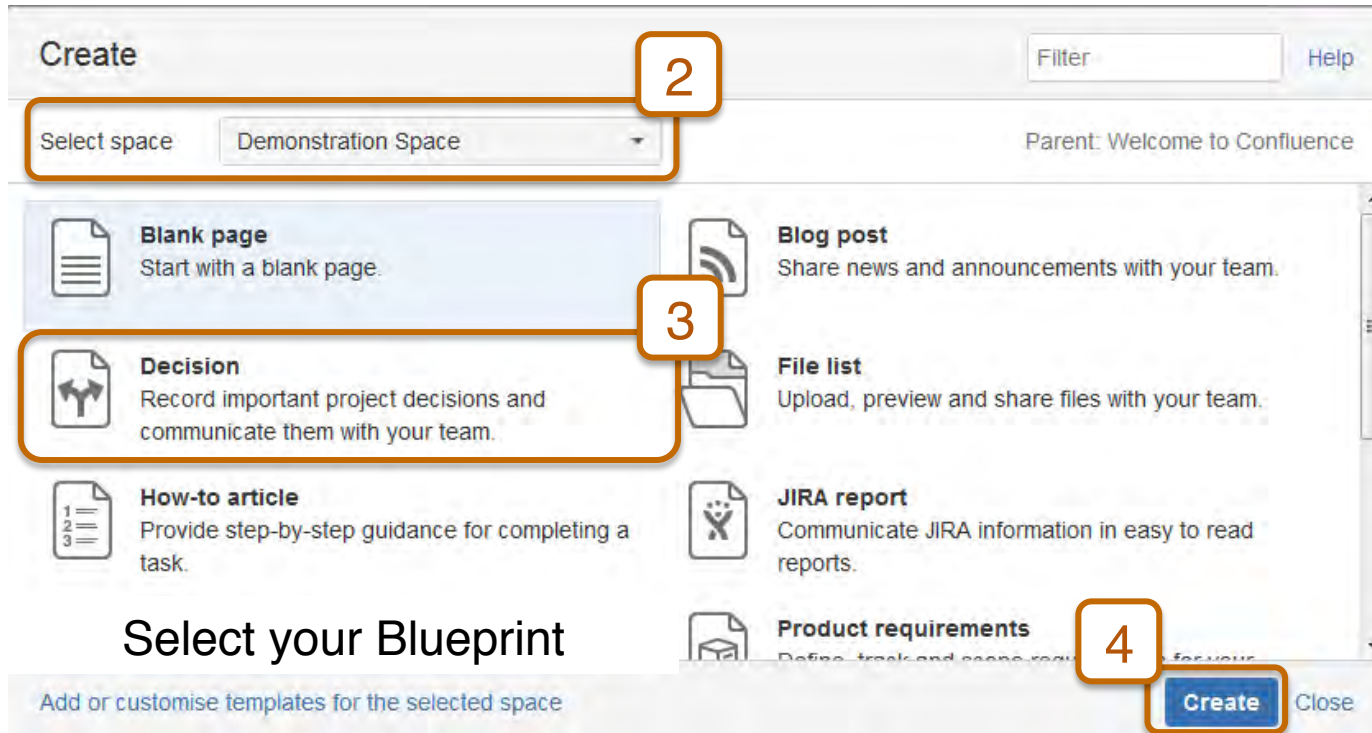template available

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Blueprints Introduction

- A Blueprint is a type of template with additional functionality and properties useful for easy content management

- Access and create a page using Blueprints using the same process as Templates

- Blueprints management is similar to Template management

- You can customize or disable existing blueprints

- Download additional blueprints from the Atlassian Marketplace

Using Blueprints

Select space in which to create page

Select your Blueprint

Create Blueprint

Complete fields for selected blueprint

Blueprint Features

- Each blueprint is a page in Confluence
- Pages created using blueprints inherit default labels, helpful in collecting and reporting pages in space
- The first time a blueprint is used in a space, Confluence creates an index page for that blueprint type and adds a shortcut to your sidebar
- Index Page displays collection of all pages for the blueprint type in a given space, along with other relevant page properties

Blueprints – Decision Page

Engagements /... / Business Requirements Doc - Sample

Go-No Go

Created by Swati Jain just a moment ago

Edit • Watch • Share • Tools ▾

Status	NOT STARTED
Stakeholders	@ Brandon Huff
Outcome	
Due date	08 May 2015
Owner	@ Swati Jain

Background
- Review open items
- Review Risk
- Review options with Stakeholders

Action items

Like   Be the first to like this

decisions ✎

Write a comment…

- Confluence page content filled from blueprint
- Can now be modified as a standard page

Default label "Decisions" added to page created from Decisions Blueprint

Blueprints – Decision Register

Create new Decision pages

Existing Decision
pages in space

Other Useful Blueprints

- ## JIRA Report Blueprint
  - Communicate JIRA information in easy to read reports.

- ## Meeting Notes Blueprint
  - Plan your meetings and share notes and actions with your team.

- ## Product Requirements Blueprint
  - Define, track and scope requirements for your product or feature.

- ## Retrospectives Blueprint
  - What went well? What could have gone better? Crowdsource improvements with your team.

- ## Task List Blueprint
  - Keep track of tasks for your team or project.

Summary: Confluence Essentials

- Learn how to format content in a page
- Understand the available macros and how to apply them to a page
- Using template and blueprints

- Creating and promoting Templates
- Using Blueprints
- Creating Blueprints

Online Resources

Resource	Location
Confluence User's Guide	https://confluence.atlassian.com/display/DOC/Confluence+User%27s+Guide
Confluence Macros & Collaboration	https://confluence.atlassian.com/display/DOC/Macros https://confluence.atlassian.com/display/DOC/Collaboration

Thank you!