



CONFLUENCE 101:

Getting started in Confluence

About the Authors



Terrence Caldwell

Product Marketing Manager,
Atlassian

Terrence Caldwell has been on the Confluence marketing team for 3+ years. He's passionate about helping customers get the most out of their experience in Confluence. He spends his time creating content and working with customers and with the product team to optimize that experience. Outside of work you can find him obsessing over, playing, and attending sporting events.



Jamey Austin

Content Marketing Manager,
Atlassian

Jamey believes Thomas Mann had it right when he said, "A writer is someone for whom writing is more difficult than it is for other people." When he isn't twisting his beard staring at words on a screen, Jamey might be wandering the streets listening to Spotify, teaching his kids the finer points of rochambo, indulging a basketball jones, or generally spending an inordinate amount of time feeling completely amazed by it all. Find him on Twitter: [@jameyaustin](https://twitter.com/jameyaustin).

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Introduction

Confluence 101 provides the coursework you'll need to get started in Confluence, and begin your journey toward Confluence advanced degrees.

[Confluence](#) is a powerful tool and we want you to get the most out of it. Like so many applications we use every day, there are layers upon layers of functionality in Confluence. And that's awesome. But just like learning to play an instrument or speak another language, it's essential to embrace the basics before diving head first into the advanced stuff. Confluence 101 will help you master the basics.

The first course gets you up to speed on everything you need to start organizing your work. In Confluence, this is done in spaces. The second course dives into creating content with pages. Creating great work content is at the core of the [Confluence](#) experience. If there's a document you need to create for your team, we think Confluence should be your go-to tool. In the third course, we cover the basics of discussing and collaborating on work with your colleagues. You'll learn about the different types of comments, some best practices like sharing and watching, and find out how to set up an effective feedback loop.

If you're brand new to Confluence, long email threads, switching between multiple applications, and just plain forgetting conversations might be getting you down. This is why Confluence can really help. With Confluence, you organize, create, and discuss work *in the same place*, which means far less switching between applications and email and Post-it notes looking for information. Plus, every page you create in Confluence lives online. This means your work, the materials that support it, and the discussions around it are all in one place, accessible by everyone on your team, and by multiple devices. You'll never again have to worry about where you put your information, it's all there in Confluence. And remember: having a centralized place to organize, create, and discuss your work with your team makes your pages, projects, and final products *better*.

We want Confluence to be your go-to tool for organizing, creating, and discussing work, and we hope Confluence 101 will help build the foundation that makes your experience with Confluence awesome.

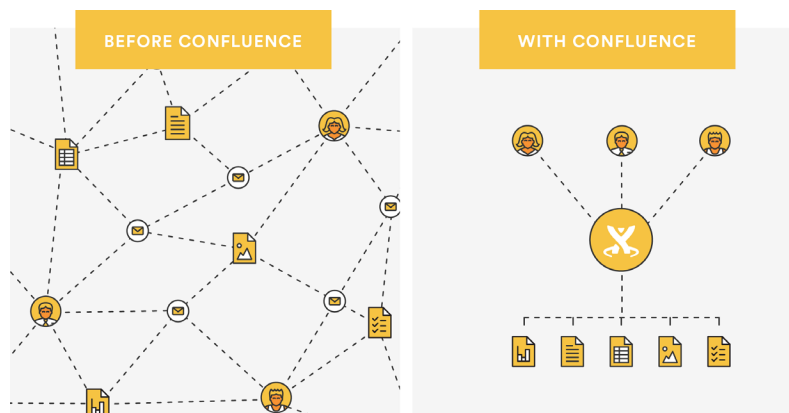
Course 1

Organize your work in spaces

Or, where to put all your work stuff (to use the technical term)

Chances are, the information you need to do your job lives in multiple places. Word docs, Evernote files, email, PDFs, even Post-it notes. It's scattered among different systems. And to make matters worse, the stuff your teammates need is equally siloed. If information had feelings, it would be lonely.

But with [Confluence](#), you can bring all that information into one place.



Confluence is a new way for teams to work together.

Core concepts of Confluence

- **What is Confluence?** An online application built to help **teams** organize, create, and discuss their work.
- **Where do I put my stuff?** Everything in Confluence is organized in **spaces**, which are a collection of related pages.
- **How are spaces organized?** Spaces are made up of **pages**. Pages are the documents in which your team will create, edit, and discuss work.

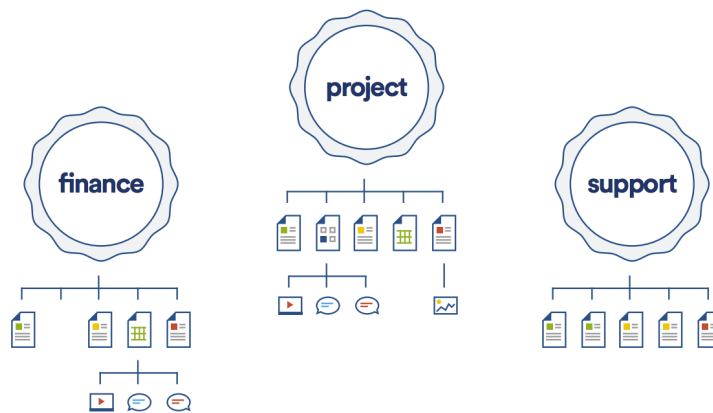
Get familiar with spaces

- **Know your spaces** - Everything your team is working on—meeting notes and agendas, project plans and timelines, technical documentation and more—is located in a space. This is the portal for your team. A small team should plan to have a space for the team, as well as for big projects.



Check out the video

- If you'll be working in Confluence with several other teams and departments, we recommend a space for each team, as well as a space for each major cross-team project. **The key is to think of a space as the container that holds all the important stuff a team, group, or project needs.**

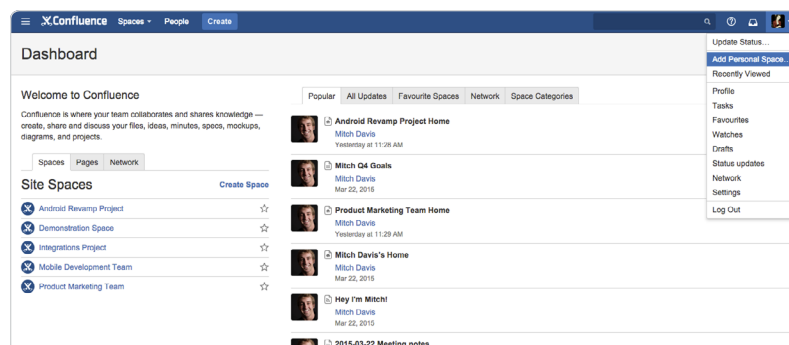


Pro tip: If you're a new user who has been invited to Confluence by a teammate, start by checking out what spaces **already exist**. Navigate to Spaces (top nav) > Look at the Space directory in the dropdown menu.

ACTION STEP: CREATE A PERSONAL SPACE

Where to find it: From the user profile dropdown (top right corner), select “Add personal space”

Your personal space is where to store the content you care about. It's a place to draft ideas, share your bio and contact information, and store stuff for personal projects. You control the permissions (more below), so feel free to draft pages that no one else can see.



BEST PRACTICES: PERSONAL SPACES

What lives inside a personal space?

(Remember, spaces are made up of **pages**. Here are some of the pages that should be included in your personal space.)

- The homepage - This is the first page you land on when you create your personal space, and what others will see when they visit. Include information about yourself and what you're working on.
- Pages not ready to be viewed by others - Create drafts of project plans, or mockups that you can later move to a team or project space.
- Pages for personal work - Create pages to track your personal goals for the quarter, or to record notes from a conference you attended.

Use your personal blog as a way to share stuff you're working on. Pro tip: Start with an intro blog.

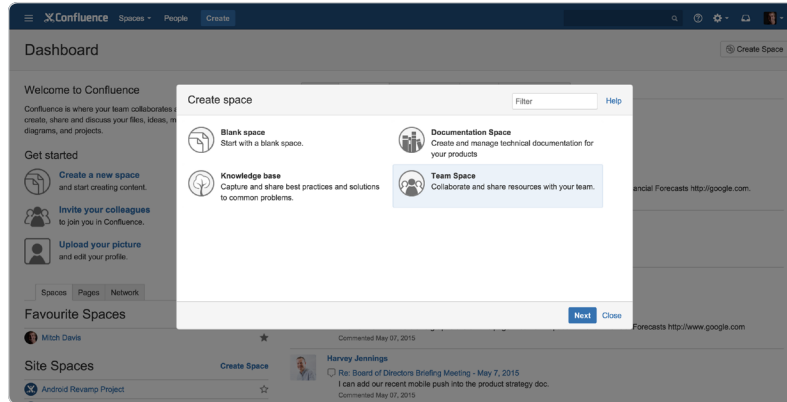
This is YOUR space, so keep track of the stuff that matters to YOU.

Include a section about yourself and add your contact info in a table.

ACTION STEP: CREATE A TEAM SPACE

Where to find it: From the Spaces dropdown, select “Create space”> select “Team space”

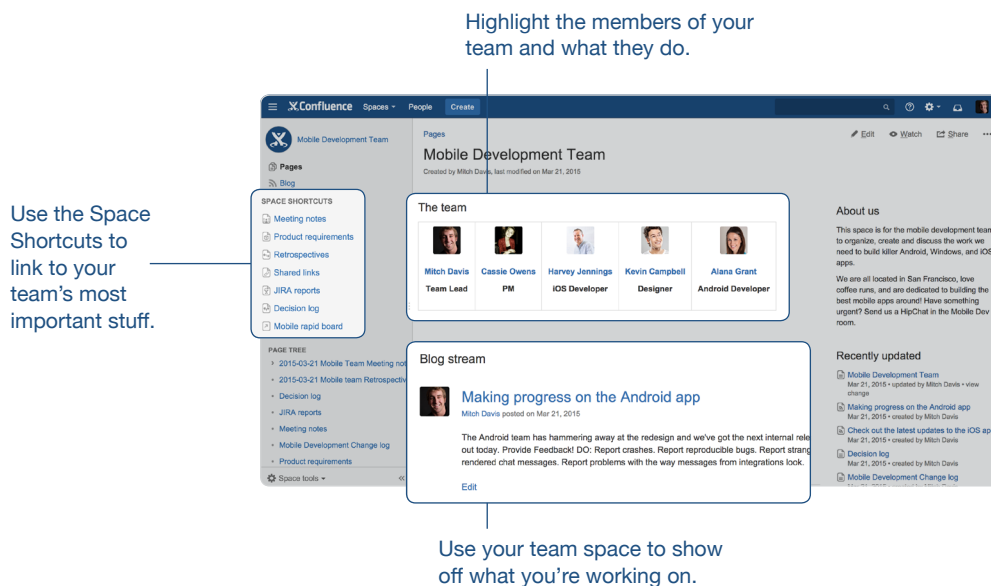
Next, create a space for your team. Since Confluence is ideal for teamwork, you’ll want to make this space inviting and useful for your teammates.



BEST PRACTICES: TEAM/PROJECT SPACES

What goes inside a team/project space?

- Team homepage - Use this page to show off your team, what they do, and any recent work.
- Space Shortcuts - Use Space Shortcuts in the sidebar to link to important pages your team needs regular access to, like your roadmap or JIRA Agile boards.
- Pages from templates - Confluence automatically collects the pages you create using templates in the sidebar. So anytime you create a new meeting notes page, file list, or decision page, it will be collected there.



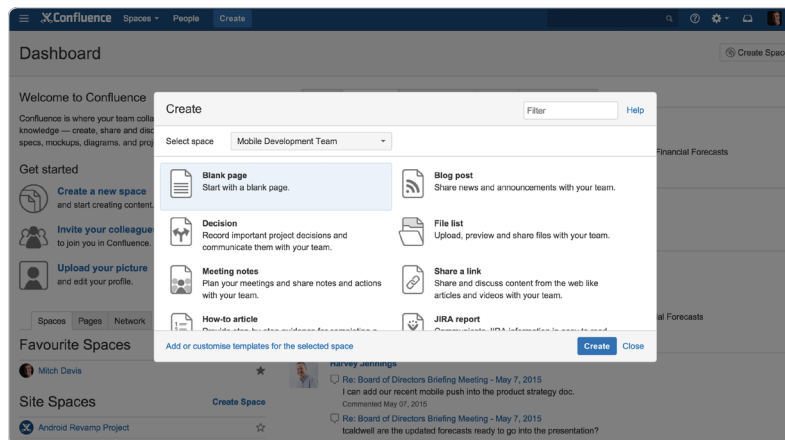
Get familiar with pages

- **Know your pages** - If you're working on something related to your team—project plans, product requirements, blog posts, internal communications, you name it—create and store it in a Confluence page. Confluence pages offer a lot of flexibility for what you can create. Several page templates are included to get you started, like the **meeting notes template**. Your spaces should be filled with pages that document your business processes, outline your plans, contain your files, and report on your progress. The more you learn to do in Confluence (adding tables and graphs or embedding video and links are great places to start), the more engaging and helpful your pages will become.

ACTION STEP: CREATE A PAGE

Where to find it: Click the “Create” button > Select a space for the page > Select the “Meeting Notes” template

Getting comfortable creating pages in Confluence is essential to your success. You may not have anything to publish at the moment, but you can get started by trying out the meeting notes template. Create a meeting notes page for an upcoming meeting, and practice using it.

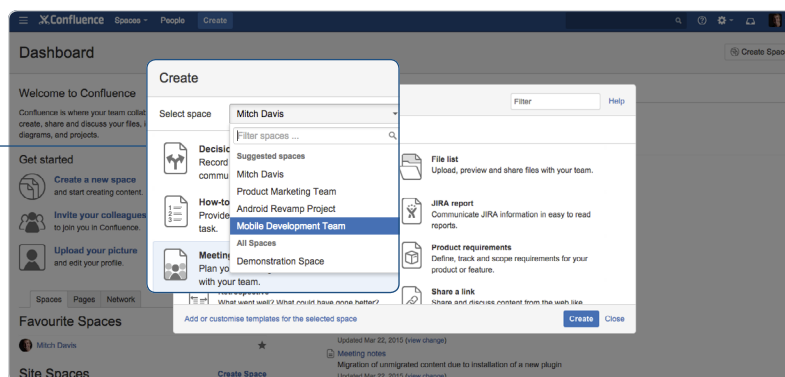


BEST PRACTICES: PAGES

Where should I create my pages?

- If you're creating a page from the navigation bar at the top of the screen (i.e. the blue Create button), make sure to select the appropriate space.
- If you're new to Confluence, start with a preconfigured template page.

Make sure to select the correct space for the page you're creating.



Get familiar with permissions

- **Know your permissions** - Along with organizing your work in spaces, and creating pages in your spaces, think about your content's accessibility. In Confluence, permissions allow you to control who can view and edit the content you're working on. This is important, because there are always documents you don't want everyone to see or edit. Keep pages private by adding and updating permissions, and restrict access to yourself, your team, or your company.

Pro tip: Pages inherit the permissions of the Space they are in. Space admins (whoever created the Space) have the power to control what content is accessible in that Space. See more [here](#).

ACTION STEP: LOOK AT YOUR SPACE PERMISSIONS

Where to find it: From anywhere in your space click “Space Tools” > “Permissions”

Permissions are really important in Confluence. They allow you to control who has access to what. If you’ve created a space for your team, make sure that everyone on the team has the proper permissions to view, edit, and add content in your space.

The screenshot shows the 'Space Tools' - 'Permissions' page in Confluence. The left sidebar contains navigation links for 'Pages', 'Blog', and 'SPACE SHORTCUTS'. The main content area is titled 'Space Tools' and has tabs for 'Overview', 'Permissions', 'Content Tools', 'Look and Feel', and 'Integrations'. The 'Permissions' tab is active, showing 'Groups' and 'Individual Users' sections. The 'Groups' section lists 'confluence-users' with a table of permissions for various actions like View, Add, Delete, Blog, Comments, Attachments, Restrictions, Mail, and Space. The 'Individual Users' section lists 'Alana Grant (agrant)', 'Cassie Owens (cowers)', and 'Harvey Jennings (harvey)' with similar permission tables.

Pro tip: You can add permissions to a specific page you’re working on by clicking on the three dots on the top right of a page.

BEST PRACTICES: PERMISSIONS

How should I set up permissions in my team spaces?

- Give everyone in the company or Confluence site the ability to view and add content to the space **but not** delete.

- Give your team full access (both the ability to add **and** delete content).

Allow all users to view, but not delete, content in your space.

Give your team full access.

Groups

These are the permissions currently assigned to groups for this space.

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

[Edit Permissions](#)

Individual Users

These are the permissions currently assigned to individual users for this space.

	All			Pages		Blog		Comments		Attachments		Restrictions	Mail	Space	
	View	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin		
Alana Grant (grant)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Cassie Owens (cowers)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Harvey Jennings (harvey)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Kevin Campbell (kcampbell)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Mitch Davis (tsaldwell)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

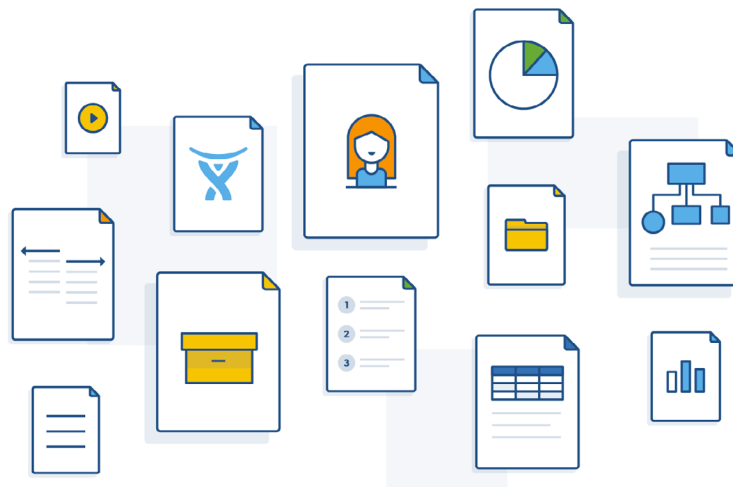
[Edit Permissions](#)

Now you've got the basics to start organizing your work in Confluence.

Course 2

Create content with pages

It's a Brand. New. Word. World.



[Check out the video](#)

In [Confluence](#), you create with pages. Think of pages as a New Age “document.” If Word docs were rotary phones, Confluence pages would be smart phones. A smart phone still makes calls (like their rotary counterparts), but it can do so much more than that.

Confluence pages can be filled with text, tables, and formatted—just like the documents you’ve always used. But that’s where the similarities stop. Confluence pages aren’t files stored locally on your hard drive, like a Word doc. In fact, a Word doc can go inside a Confluence page, along with your project plans, product requirements, documentation, meeting notes, images, video—everything. You can attach spreadsheets and PDFs, and even create automated reports.

Best of all, everything you create lives online. That means it's accessible (if you want it to be) to the people who are in your Confluence site. You no longer have to create a document in one place and share it in another. No more content siloed on your hard drive and shared by attaching a file to an email. (How 1990s!)

In a Confluence page, you can create, collect, and access all your content in one place.

What can you put in a page?

Anything. It all depends on what type of page you want to create, and your imagination! Pages can be filled with:

Rich content

- **Images.** Just drag and drop.
- **Videos.** Paste a YouTube or Vimeo URL and watch Confluence “magic” happen. (Other formats are easy to embed, too.)
- **Files.** Drop in Office docs to embed them into a page.
- **Links.** Drop in links to other web content—anything within Confluence or across the web.

Tracking information

- **JIRA issues.** Paste the URL of your [JIRA](#) issue and its summary, key, and status will automatically be displayed on the page. And since the embedded issue is rendered afresh each time you load the page, you'll always see its current status.

Functionality

- **Macros.** Macros let you add more functionality to your pages. Get to know your macros! (We think they're awesome, though we're *somewhat* biased.) Macros in Confluence are similar to Excel macros or Google widgets. They add functionality, formatting, and the capability to include dynamic content. Confluence has boatloads (technical term) of macros that do different things.

Pro tip: How to insert rich content. While in “edit” mode, click the + in the toolbar (**Insert** menu) to add content like files, images, macros, even JIRA issues. Remember: you can also just drag and drop, or paste links directly into the page.

What kind of pages can you create?

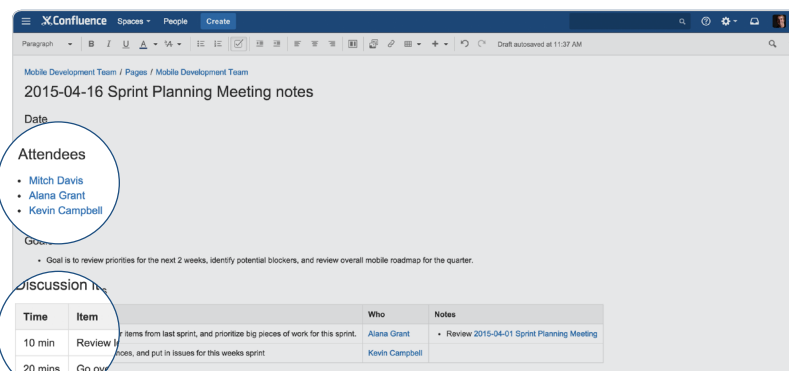
Let's start with some practical examples. Confluence comes with several pre-formatted page templates:

- **Meeting notes**

The **meeting notes template** is an easy way to draft an agenda for an upcoming meeting, capture notes and action items during the meeting, and store the page for attendees to revisit once the meeting is over. You can add follow-up items in a task list, and assign tasks to teammates with an @mention.

Use @mentions to create a list of attendees. They will be notified once the page is saved.

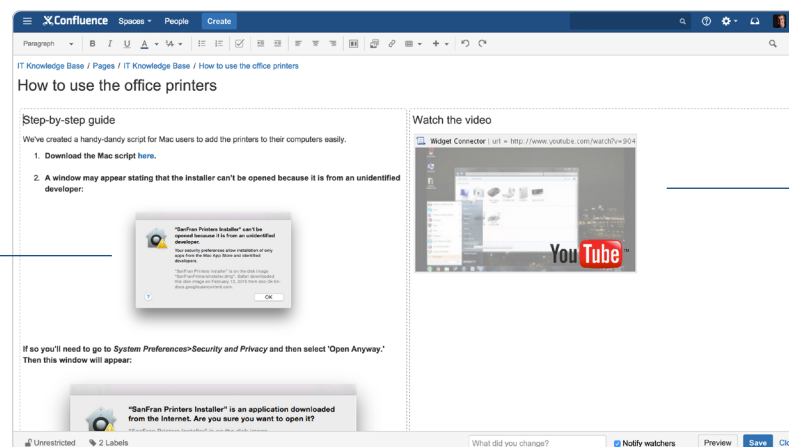
Use the table provided to list discussion items. Use the notes to reference other pages, or related items.



- **How-to**

The **how-to template** is perfect for documenting solutions to common workplace problems. Add images and instructional videos to make sure your page appeals to visual learners.

Drag-and-drop images into your pages.

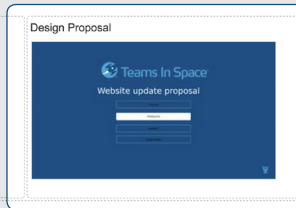
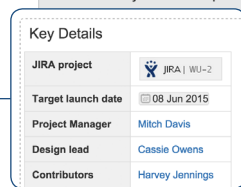


Paste YouTube or Vimeo links to embed video.

• Project planning

An “official” project planning template isn’t included, but it’s easy to create a project planning page from scratch in Confluence. A description of your project, plus tables for key details, milestone dates, and risks are among the more popular elements to include. If you use JIRA to track software projects, you can embed a single JIRA epic or a list of related JIRA issues in your page as well.

Embed JIRA issues. Just paste in the JIRA URL for a single issue, or use JQL for multiple issues.



Embed Office docs like Powerpoint presentations. Just drag and drop it into the editor.

What else do you need to know about pages?

Here are four important things to keep in mind about pages:

- **They live online.** Confluence pages live online. This is very different from word processing apps where you create and store documents offline, and means everything you create is accessible (if you want it to be) to people on your team.
- **Use page restrictions.** You control who has access to the pages you create with [page restrictions](#), which means you can set who can view and/or edit your pages, and update those restrictions at any time.
- **Pages can be nested.** Keeping work organized is a big part of Confluence. Every page lives in a space, but you can also nest pages in a hierarchy within each space. From any page in Confluence, when you select the blue Create button in the header the new page automatically becomes a “child” of the original or “parent” page. For example, you might have a page called “Marketing Roadmaps,” and child pages under that page could be “Q3 Marketing Roadmap” and “Q4 Marketing Roadmap.”
- **Start with a template.** If you don’t want to start with a blank page, Confluence comes with a range of templates to give you a head start with best practice examples.

Pro tip: Starting with a blank page can be a little daunting. That's why we created templates for the most popular and useful types of content people create in Confluence. Try one of our templates like "Meeting Notes," "Product Requirements," "File lists," or "JIRA Reports." Templates will help you get familiar with how pages work and, when you've got the hang of it, you can even [create your own!](#)

What about some tips and tricks for creating pages?

We thought you'd never ask! Tips and tricks are *always* fun—especially if they're about creating Confluence pages. There are lots and lots of tricks, but here are a few about macros to get you started.

Quick tips and tricks about macros

One of the great things about Confluence pages is how rich and dynamic you can make them. Macros are the secret sauce that allow you to get creative with your pages. To add any of the following macros to a page, choose + in the toolbar and select **Other macros**, then search for and select the macro. (Nifty shortcut: type { and a list of Macro suggestions appears.)

A few of the most popular **macros**:

- **Status:** When creating pages that track the status of milestones, projects, or progress of work, use the **status macro**. It provides a visual status bar that you can update with color and text. Anyone who's reading your page can quickly see the status of the work.

Project milestones

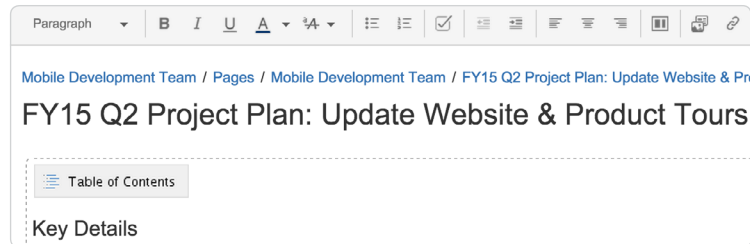
Milestone	Owner	Status
Create planning page	Alana Grant	COMPLETE
Scope out biggest pieces of work	Alana Grant	COMPLETE
Assign owners and project lead	Harvey Jennings	IN PROGRESS
Launch project	Mitch Davis	NOT STARTED...

Edit

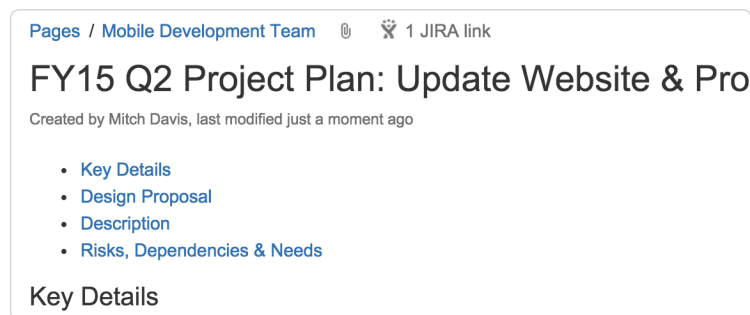
NOT START...

Remove

- **Table of contents:** If you're creating a long page, the **table of contents macro** makes it easy for readers to jump to each section. The macro automatically grabs all the headings in your page and creates a table of contents with links to each heading. (Talk about cool!)

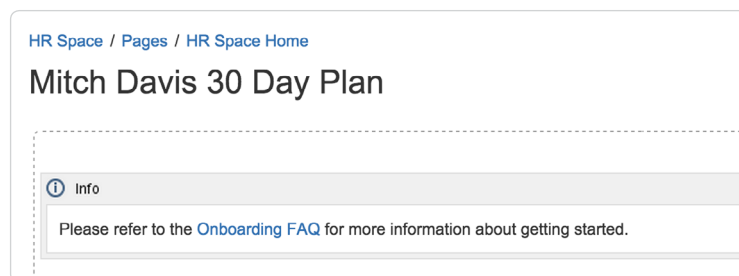


ToC macro
in edit mode

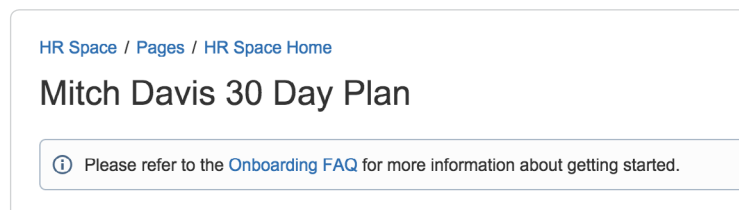


ToC macro
when saved

- **Info:** The **info macro** gives you a visual information box where you can call out useful information. Put an info macro on the top of your page to reference other relevant pages or to give a brief summary.

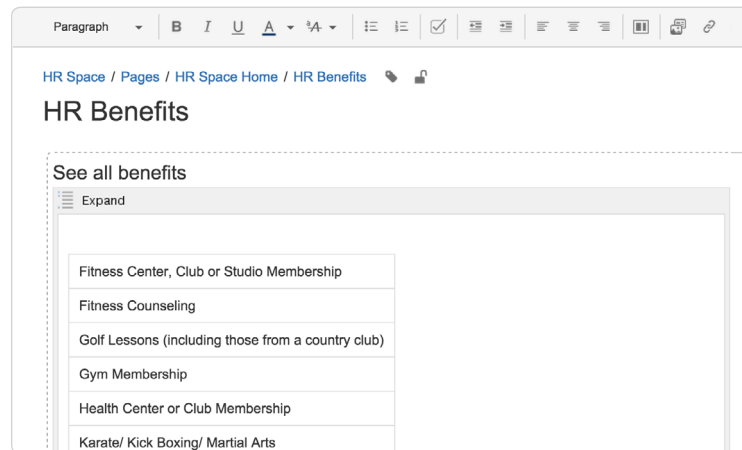


Info macro
in edit mode

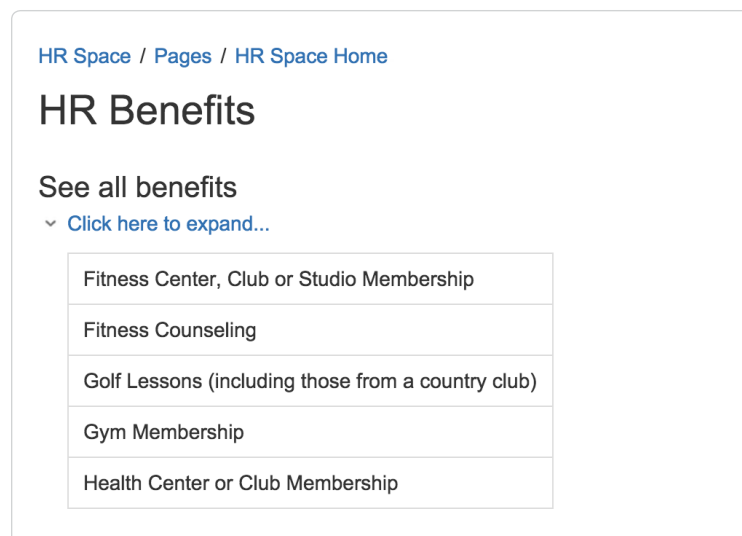


Info macro
when saved

- **Expand:** The **expand macro** is great for providing extra detail in your page without the page becoming too lengthy or busy. The expand macro creates a collapsible/expandable section where additional content lives.



Expand macro
in edit mode



Expand macro
when saved

Bonus! Because everybody loves keyboard shortcuts.

Here are a few valuable keyboard shortcuts you can use in Confluence to save yourself time and clicks.

SHORTCUT	INSERTS	DESCRIPTION
//	28 Oct 2014	date
@	Mention someone by typing their name	@mention
{	Any macro. Start typing the macro name, then choose the one you want	macro
[Link suggestions	Link to a page, or other web content
*	Bullet	Bulleted list

If spaces in Confluence are the containers you use to organize your work, pages are the individual items you use to fill up those containers. Try out a template, drop in an image, and use a macro or two. Playing around in Confluence is the best way to test out what it can do.

Course 3

Discuss work with your team

Get everyone on the same page - literally

The plan is set. The documents are in order. Now what? Feedback, feedback, feedback.

Getting a project outlined and adding the right content are just the first steps. Now it's time for your team to weigh in. [Confluence](#) makes it easy to discuss your work – with your team, your boss, or your entire company – in the same place where you organized and created it.



[Check out the video](#)

That's the true beauty of Confluence: collaboration. Because nothing is more important when working together than the ability to communicate with ease, *and keep track of all those conversations*. Discussing work with your team makes your projects, your pages, and your final products better.

How do you discuss work?

Confluence gives you options, which help you decide which type of feedback best suits the page or project.

Comments - Discussions in Confluence happen in comments. Confluence comments live right alongside your work so the feedback you need isn't difficult to locate or siloed in another system. You (the owner of the page) and everyone you share the page with (or eventually reads the page) has full context to the discussions taking place in comments.

There are three types of comments: **page**, **inline**, and **file comments**.

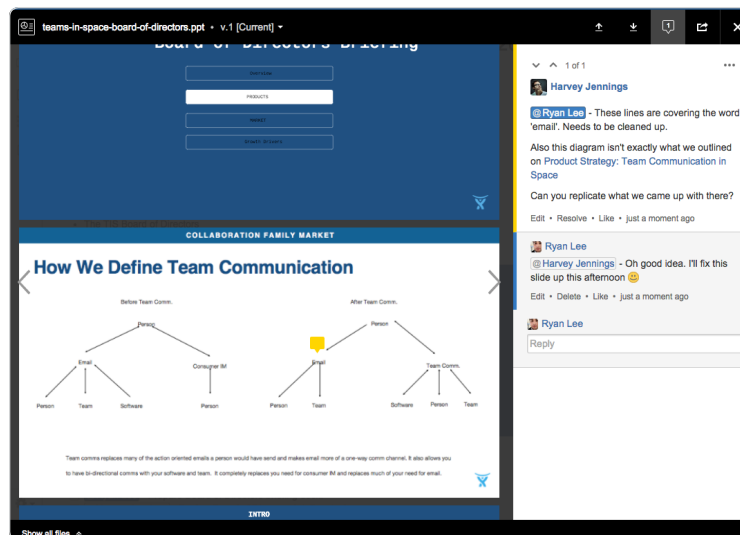
- **Page comments** are located at the bottom of the page, and are best used for overall feedback. As multiple comments come in, they form a discussion thread.
- **Inline comments** appear alongside the content of the page and are great for giving specific feedback within the text of the page itself. To create an inline comment, simply highlight the text and Confluence provides two handy choices: “Add inline comment” and “Create JIRA issue.” After the inline comment is made, the highlighted text remains on the page for the owner, and other readers, to discover. Once the page owner has incorporated or acknowledged the feedback, inline comments can be resolved. (Which removes the highlighting from the text.)

The screenshot displays a Confluence page for a 'Board of Directors Briefing Meeting - January 20th, 2015'. The page layout includes a left sidebar with navigation options (Spaces, People, Questions, Calendars, Create) and a main content area. The content area is divided into several sections: 'Date' (Jan 20, 2015), 'Attendees' (Ryan Lee, Harvey Jennings, Alana Grant), 'Goals' (Brief the Board of Directors on: Product strategy, Current sales numbers, Forecasts for FY2015, Answer questions from board), 'Discussion Items' (a table with columns Time, Item, and Who), and 'Briefing Deck' (a presentation slide titled 'Teams in Space'). A comment thread on the right side of the page shows a comment from Alana Grant asking 'Are the forecasts ready to go into the presentation?' and a reply from Ryan Lee. The interface also includes a 'Create' button in the top right corner and a 'Save' button at the bottom of the comment thread.

Time	Item	Who
10min	Intros	[Profile Picture]
35min	Briefing	[Profile Picture]
15min	Q&A	[Profile Picture]

Pro tip: Use @mentions in comments to alert teammates to your remarks. Confluence also sends an email to the owner of the page and all “watchers” of the page with the content of the comment. (More on watchers below.)

- **File comments** are comments you place directly on your embedded files. When viewing a page, click on the embedded file and select “**Drag this pin to add a comment**” and that’s it! You don’t have to switch between the file and an email thread to provide feedback, and all your page’s comments are in one tidy, contextual place. You can even drag more pins to comment on different parts of the file.

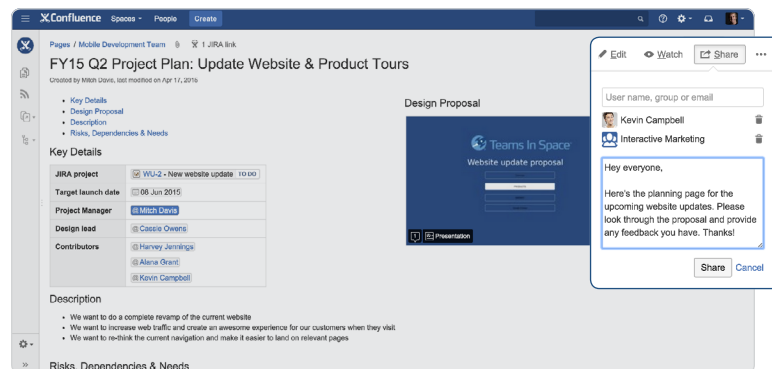


Pro tip: Rather than keeping related files in repositories or cloud storage systems, attach them to Confluence pages. This way, all your files live alongside the work they pertain to. Attach a presentation to a meeting notes page, for example, so all meeting attendees have it handy. Or, attach mockups and wireframes to your product requirement docs to give everyone involved the proper context. With file comments, you can engage in discussions on the embedded file itself.

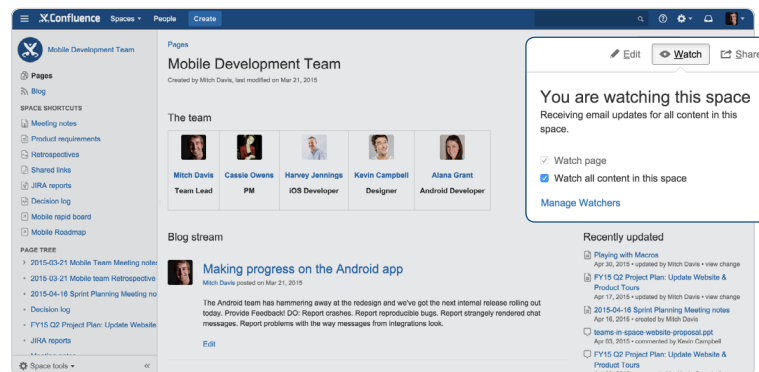
Best practices for discussing work

- **Share button** - The share button is a quick way to share your page with a teammate, your team, or a larger group. Address it to individual Confluence users and groups, or even to an email alias. Sharing is a simple way to ask for feedback or approval without leaving Confluence. Add a note about what the page contains, or the kind of feedback you’d like. Sharing the page triggers a

notification in the Confluence workbox (the file tray icon in the header next to your picture), and sends an email notification to each recipient.

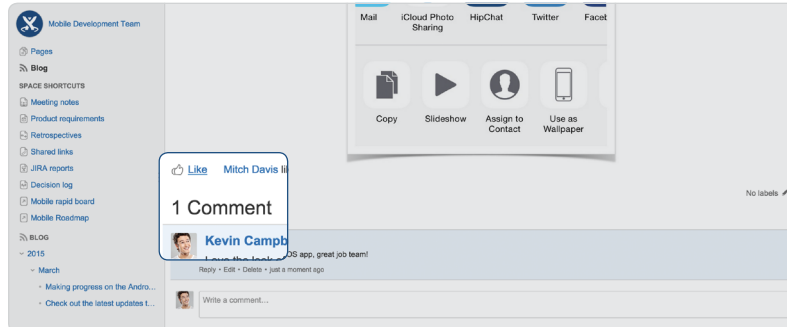


- **Watch button** - “Watching” a page means you’ll get notifications about all changes made to the page, including comments. This is one of the best ways to stay on top of the work happening on a page. You can also watch an entire space to stay up-to-date on the work of a team or project with many pages.



- **Likes** - Don’t have time to leave a comment but want to show approval of a page? Use likes as a lightweight way to show acknowledgement.

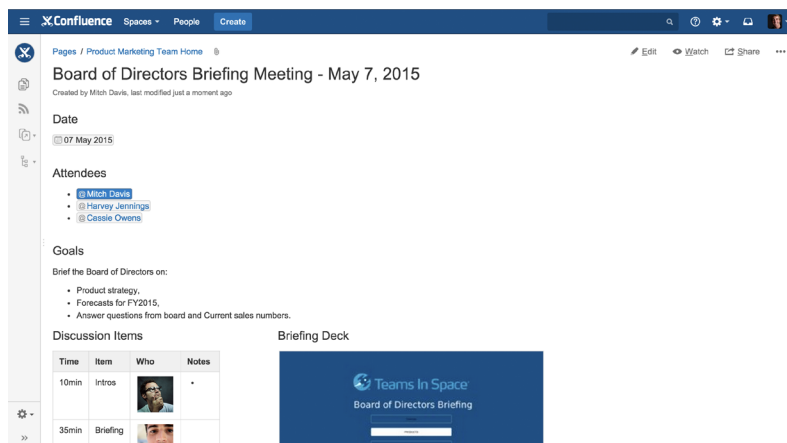
Another cool thing about Confluence likes is that as the amount of likes on a page grows, it increases the likelihood that the page will show up in the **Popular tab** on the Confluence dashboard. (Read more about the [dashboard](#).)



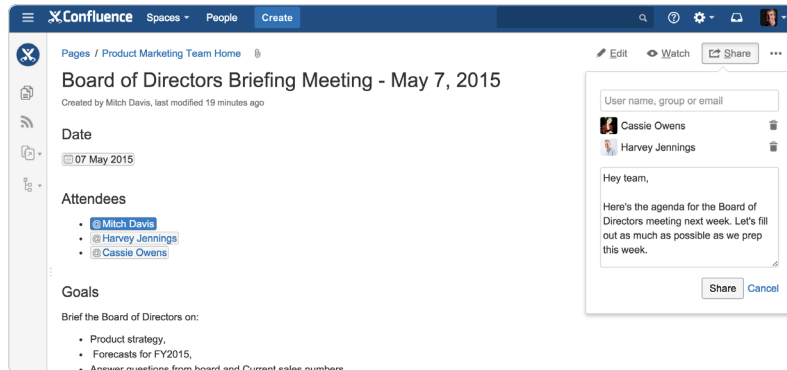
See how it's done

Let's take a look at a typical Confluence review cycle:

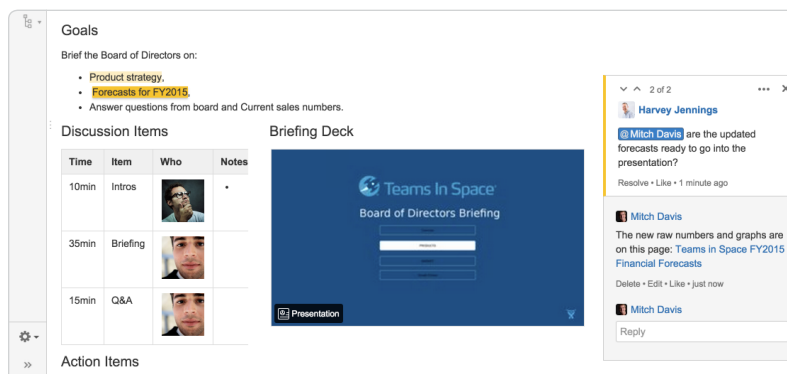
Create a page. Everything starts on a page. Create a page to start planning for a project or milestone that your team has coming up.



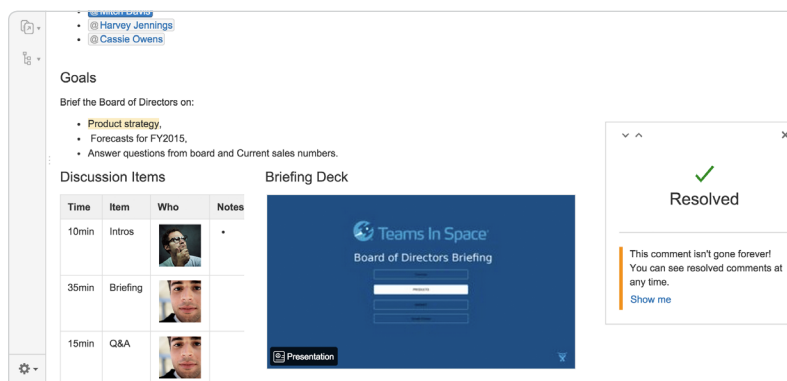
Share it with your team. Once your page is ready for feedback, use the share button to send it out to your teammates.



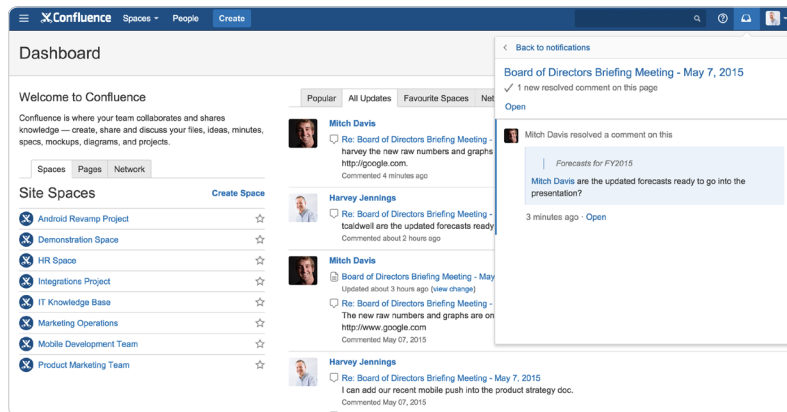
Add comments. Everyone you shared the page with will receive a notification in their Confluence workbox, as well as an email. They can immediately jump into the page and start adding comments.



Edit page, resolve comments. Edit the page to incorporate feedback. When ready, click “resolved” on the inline comment. The highlighting disappears, and your collaborators will get a notification letting them know their comments have been addressed.



Save page, notify watchers. As you edit the page, incorporate feedback, and resolve comments, everyone you shared the page with gets updated. Also, anytime someone else edits the page, you'll be notified. This ensures that everyone knows when changes are made, and work stays transparent.



Pro tip: Uncheck the “notify watchers” box at the bottom of the screen before clicking “save” for minor changes that don’t warrant your teammates’ immediate attention. They’ll appreciate your thoughtfulness.

Report Card Checklist

- ☐ Make yourself feel at home in Confluence and upload a profile picture.
- ☐ Create your first space. If you've started a trial by yourself start by creating a personal space, if you're trying with others start with a team space.
- ☐ Get familiar with your first space. We provide a task list to help you get started. Complete the tasks, and edit your space homepage to make it your own.
- ☐ Once you've got a feel for your first space, try creating a page.
- ☐ Start with a Meeting notes page. Use the template we provide, and create an agenda for your next meeting. Use it to take notes, and add action items that you need to follow-up on.
- ☐ Experiment with some of the other page templates and try adding rich content like images, video, and macros.
- ☐ If you haven't already, invite some other people to use Confluence with you.
- ☐ Share a page that you've created with a colleague, and ask for them to provide feedback with comments.

Conclusion

One of the biggest benefits of Confluence is that as more people in your organization use it, it becomes the go-to place to find important information about what others are working on. When everyone is in the habit of adding all relevant information to a Confluence page, and having all conversations on that page, there's no need to use another tool or system to look for the right information—it's all right there.

Confluence is a new way for teams to work together. If you take the time to master the basics, the ways you can use it are practically limitless. We hope Confluence will quickly become indispensable to your workflow as your primary tool for organizing, discussing, and doing work.

Congratulations, you've completed the Confluence 101 coursework. Happy collaborating!

Start your free Confluence trial now