



# Confluence Training Manual

VERSION: 1.0

Created: 6/29/2021

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Owner: IT

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**Created:** 6/29/2021

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## Confluence Training Manual

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*The Management team of the Sacramento Area Sewer District and Regional San extends gratitude and appreciation to each District employee who helped develop this training manual. This is a valuable resource that will lead us to meeting our mission to protect public health and the environment by efficiently and effectively collecting sewage for our community and our vision of setting the bar for essential sewage collection services.*

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# Section 1: Preface

## Purpose

The purpose of this training manual is to provide general knowledge and job aides for the Confluence software.



## Background

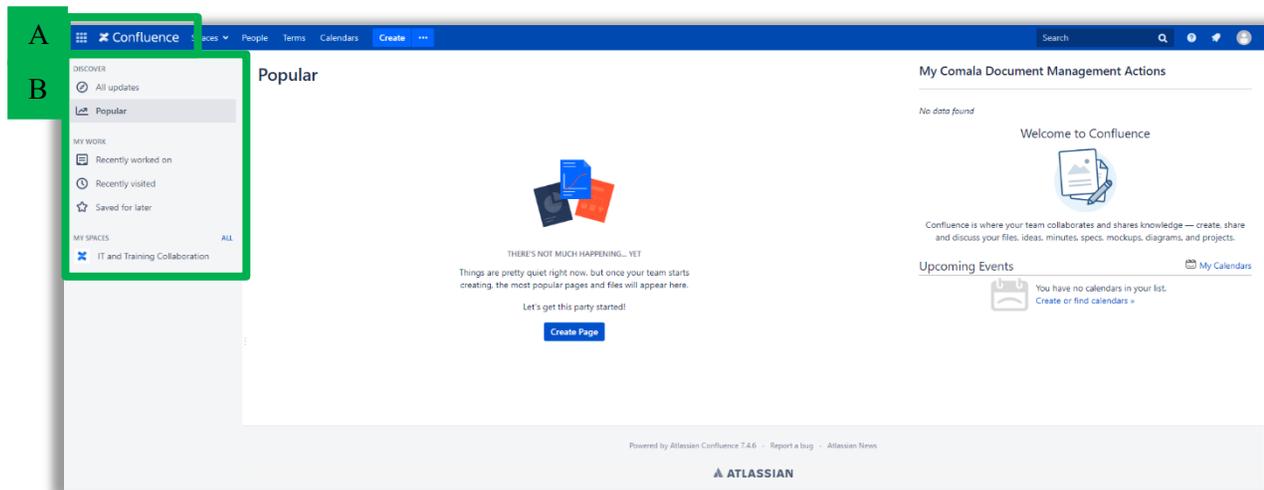
Confluence is a web-based collaboration software. SASD and Regional San use Confluence to:

- Have one place for teams to share, find, and collaborate.
- Capture the knowledge (that is too often lost in email inboxes and shared network drives) where it is easy to find, use, and update.
- Keep information organized and accessible with a flexible page hierarchy.
- Create anything with a rich content editor in the web browser: meeting notes, product requirements, file lists, or project plans.
- Target feedback on any Confluence page or file – project plans, Office files, images, anything – with inline comments.
- Feedback is in context and in one place, so time is not wasted connecting feedback in email with work done elsewhere.
- Capture and retain the collective knowledge of the organization as it changes and grows.

## Section 2: Dashboard

The Dashboard is the first thing a user will see when logging into Confluence. The dashboard serves as a hub when a user is on the Confluence site. The Dashboard provides users with access to important information and updates.

### Dashboard Features



- A. **Site Logo:** The Dashboard can be accessed from anywhere in Confluence by clicking on the site logo on the left side of the Confluence header.
- B. **Sidebar:** The Sidebar houses information that helps users navigate through Confluence as well as access information:
  - a. **Discover:** Users can see all relevant information happening on the sites they have access to view.
  - b. **My Work:** Shows recently worked on Spaces, Recently Visited Spaces as well as Saved Spaces.
  - c. **My Spaces:** Shows “favorite” spaces.

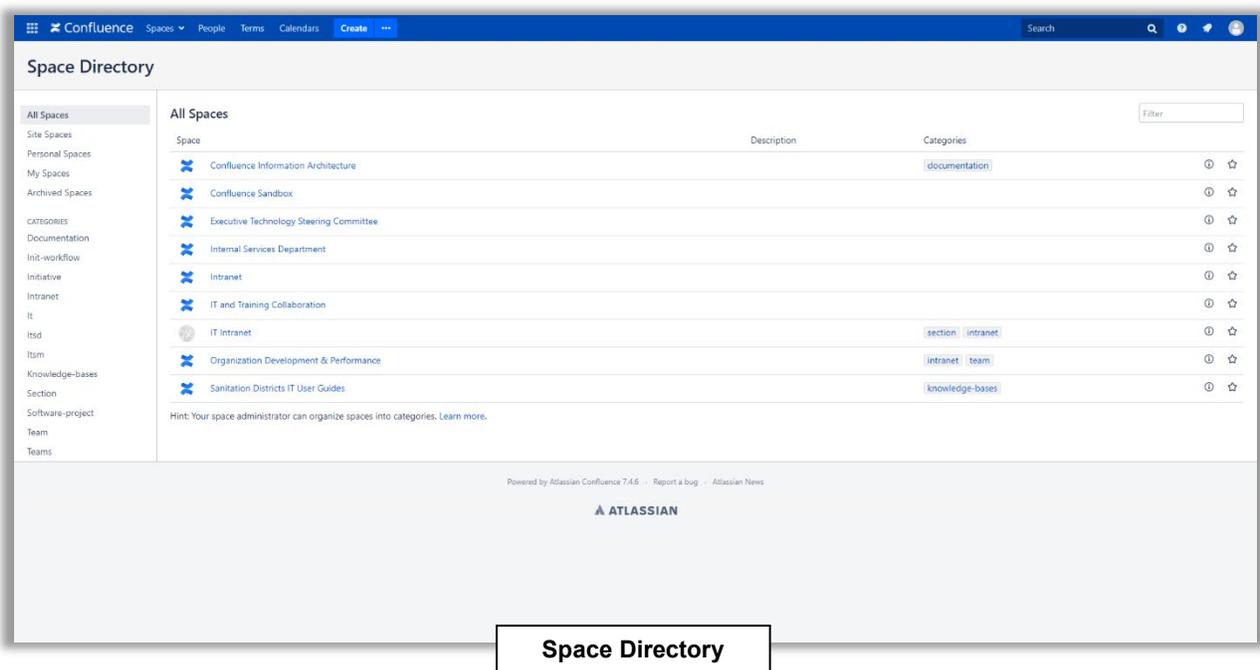
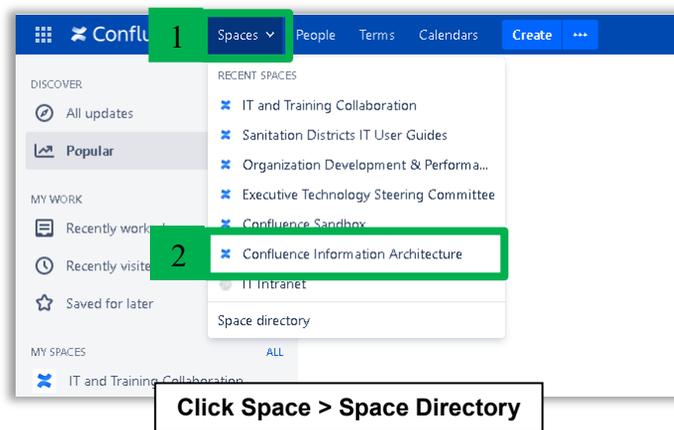
## Section 3: Spaces & Navigation

Spaces are places that allow users to collaborate with others on a specific topic or project. Spaces can be created or existing spaces can be joined by others. Examples of spaces can be Department spaces, Personal Spaces, or specific Spaces for particular projects. If a new Space is needed, users must submit an ITSD request.

### Space Directory

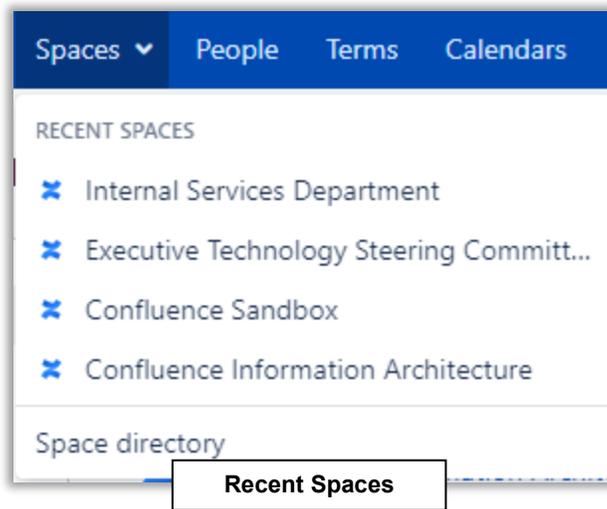
A Space Directory will show and filter all the spaces in a user's Confluence site. To access the Space Directory:

1. Click the **Spaces drop down menu** from the Confluence Header
2. Click on **Space Directory**



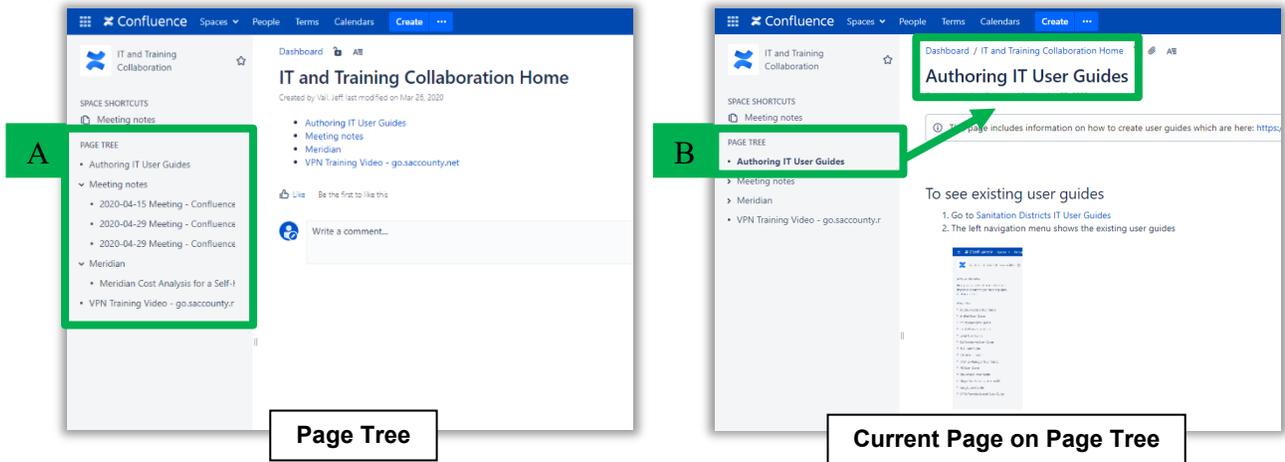
## Recent Spaces

Recent Spaces is a tab that shows all the spaces that have been previously visited.



## Page Tree

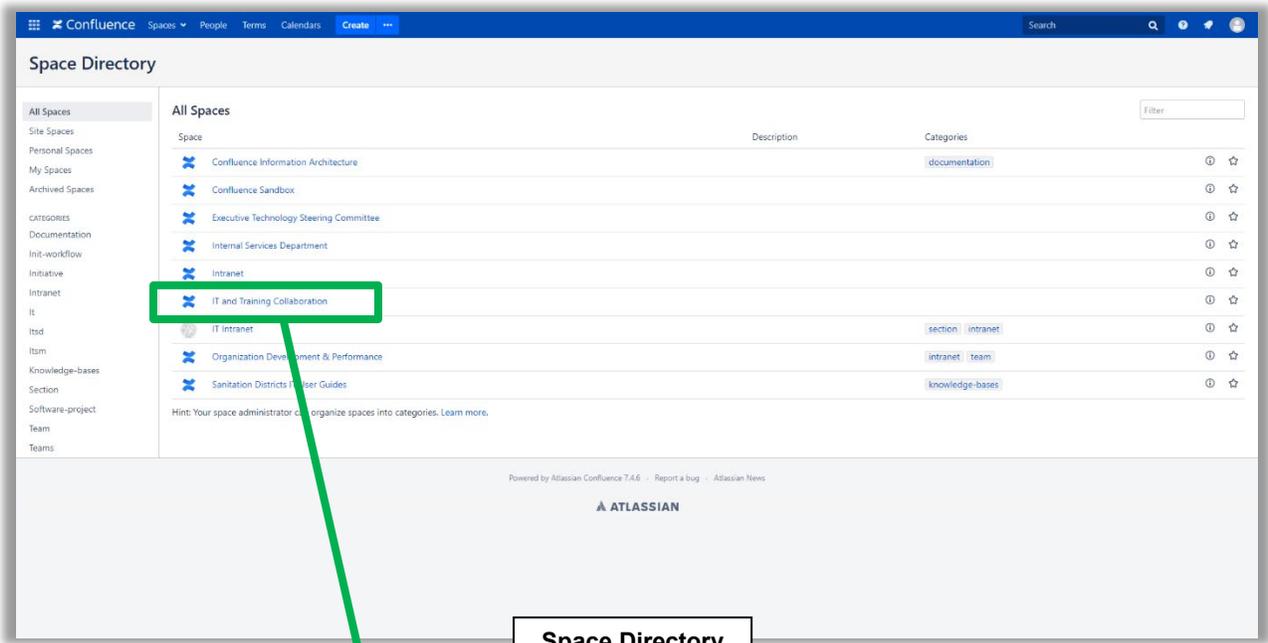
The Page Tree displays a hierarchical list of pages from a specified parent page. The Page Tree is accessed from within a Space and can act as a table of contents or a list of related topics. When viewing the page tree, users can click a link to view the relevant page. The page's current position is highlighted in the page tree.



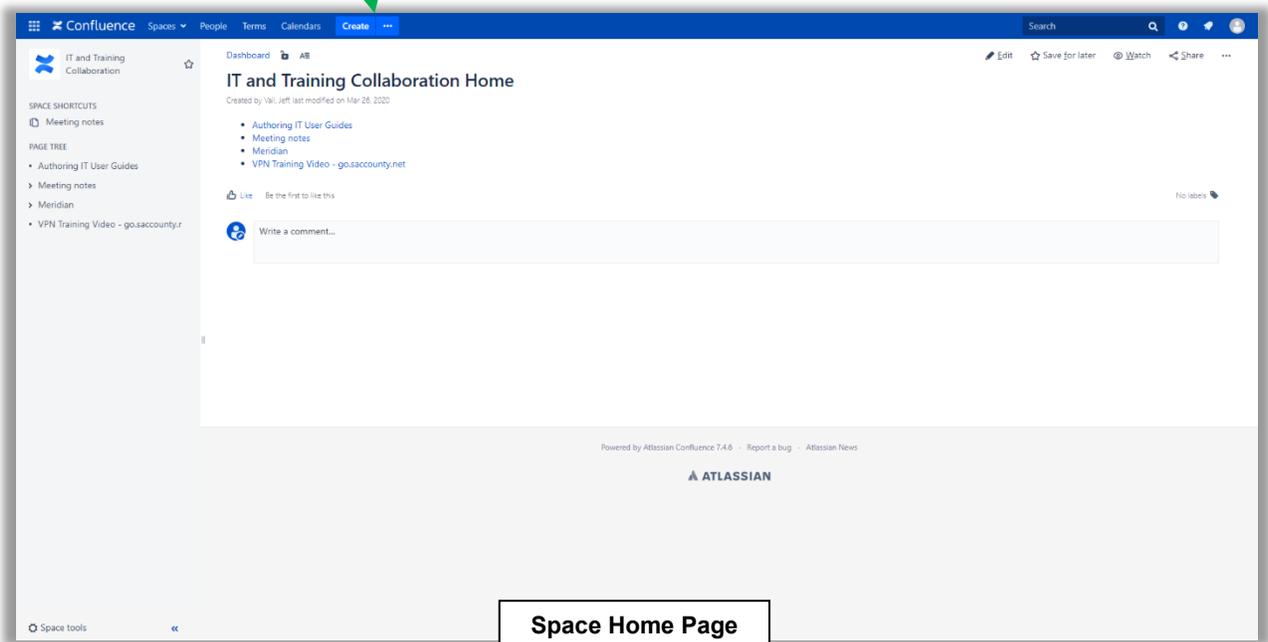
- A. Page Tree within the “IT and Training Collaboration” Space.
- B. Page that is currently being viewed which is highlighted.

# Home Pages

When a space is created, Confluence automatically populates a home page for that space. Spaces created with a template come with a ready-made home page populated with useful macros and sample content specific to the templates use case. However, users can still customize their home page to make it easier for everyone using that space to navigate their way around and find useful content. Home Pages can be found within a particular Space which can be accessed from the users Dashboard as well as the Space Directory.



Space Directory

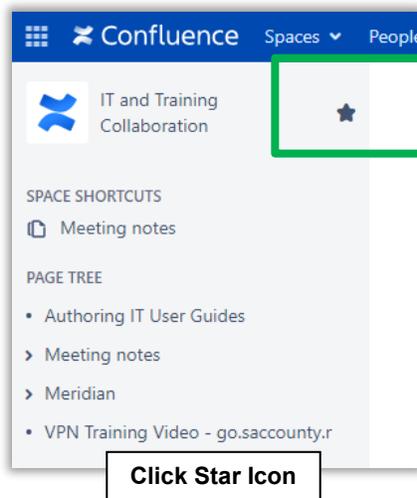
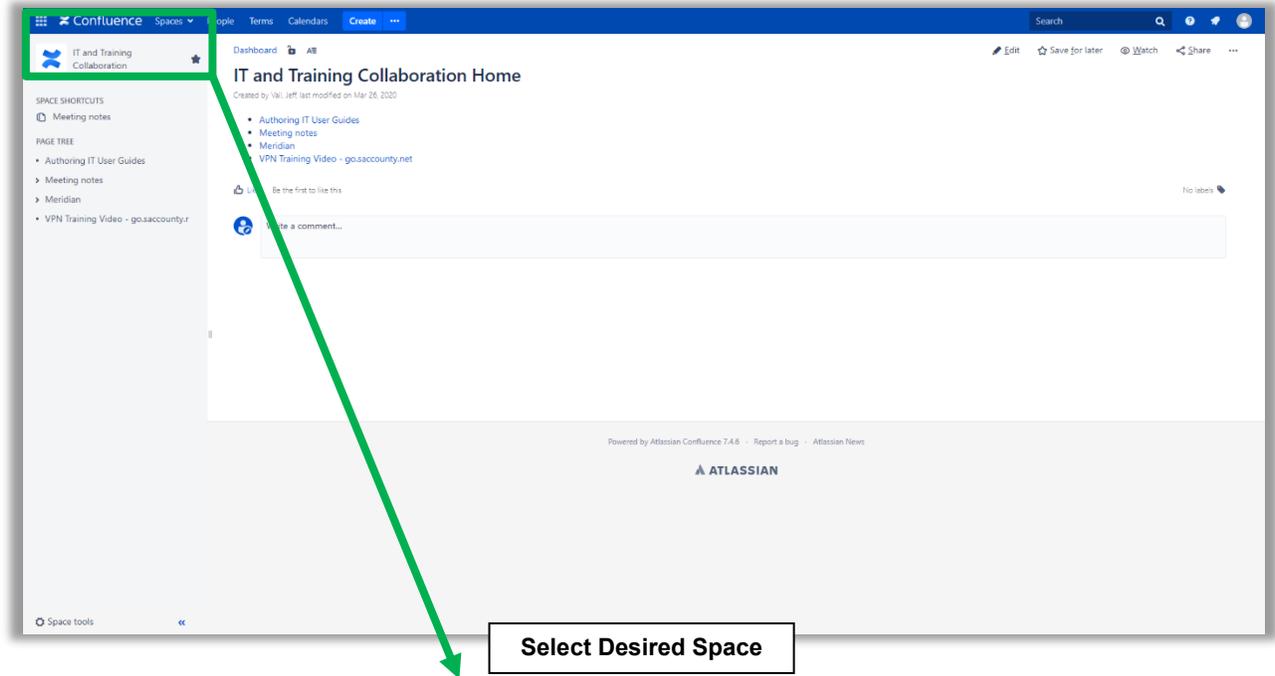


Space Home Page

## How to Add a Space as a Favorite

When users mark a Space as a “Favorite” that Space then shows up on a user’s Dashboard under “My Spaces”. Users can mark multiple Spaces as a “Favorite” Space.

1. Select the desired Space.
2. Next to the Spaces name in the upper left-hand corner **click on the Star icon**. This Space will now show up under “My Spaces” on the users Dashboard. These steps can be repeated as many times as desired.



## Section 4: Pages

Pages are documents that live within Confluence that can be accessed and edited in real time by multiple users. Pages live online so edits happen in real time and are saved. Multiple items can be added to a page such as links, images, videos, and files.

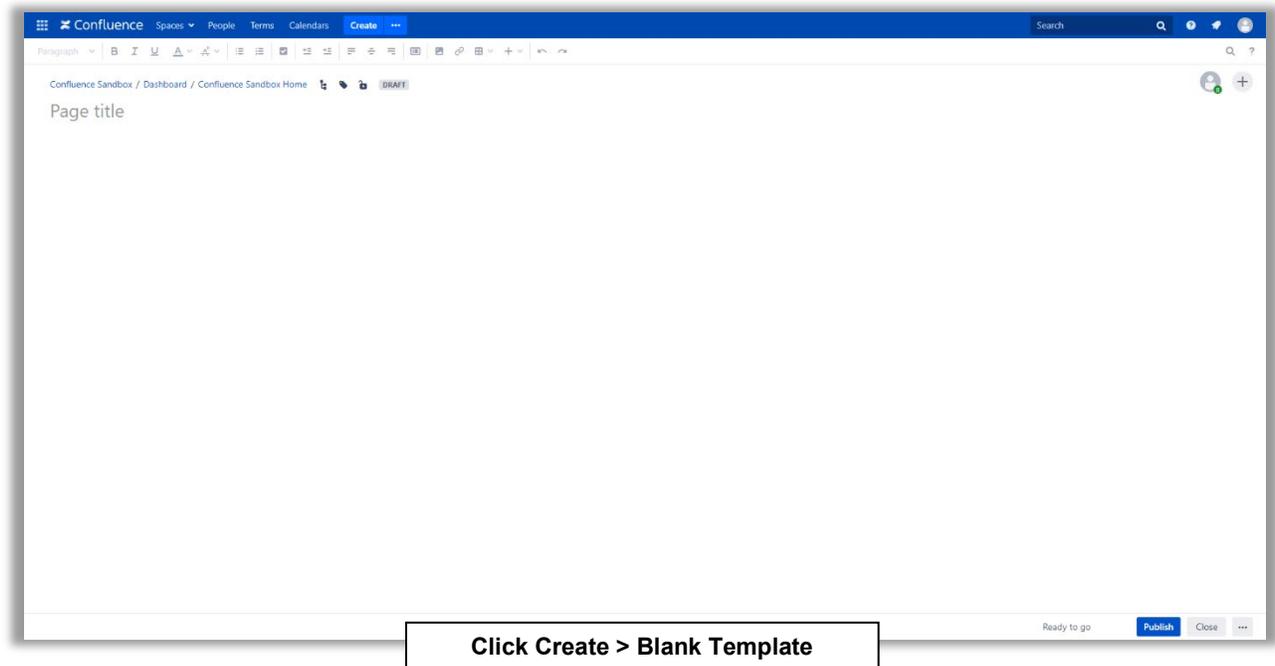
### Blank Page

Blank pages are just that, a blank canvas. When creating a Confluence page users are presented with the choice to create their own page from scratch or use various templates loaded with their own built in features. Blank pages allow a user to add content features such as images, videos, files, and links.

### Creating a Page

Create a page from anywhere in Confluence; just choose **Create** in the header and then get started. Pages are the place to capture all important (and unimportant) information; start with a blank page and add text, tasks, images, macros, and links, or use one of the useful templates to capture meeting notes, decisions, and more.

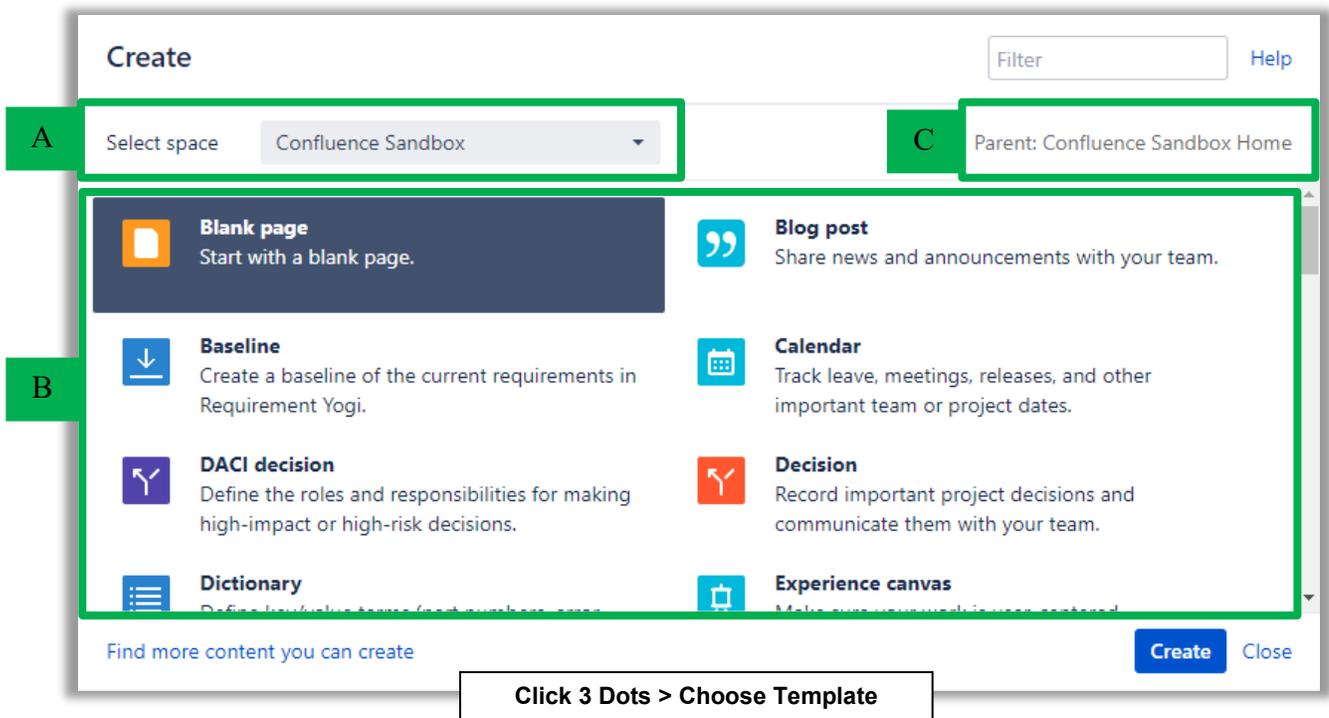
1. Click on **Create** to create a new page. This will allow the user to create from a blank page.



- Alternatively, click on the **3 dots icon** to create a page using a template.



- Select space:** Choose the space where the content will be created.
- Page templates:** Create a page from a template or create other types of content.
- Parent page:** The created page will be a child of this page.



Once a blank page or template are selected, users will be directed into the Confluence editor. The editor is where users can name or rename the page, add content, and format it. When the desired content has been added, choose **Preview** to take a look at what the finished page will look like. When ready, select **Publish** to make the new page appear in the space. If the new page is not ready to publish, the page can be found under the “Recently Worked On” section on the Dashboard.

After saving, the page can be seen in **View Mode**. The Editor can be re-entered any time by choosing **Edit** or pressing **E** on the keyboard.

## Section 5: Templates

If users do not want to start with a Blank page, then templates can be used in their place. A Template is a Confluence page with predefined content.

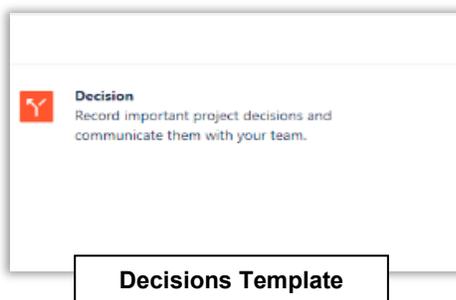
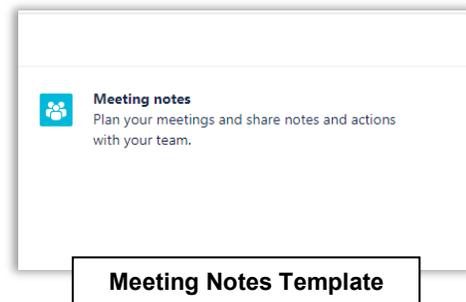
### Frequently Used Templates

Some examples of useful templates are:

- The Meeting Notes template
- The Decisions template

#### *Meeting Notes Template*

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. Users can add follow-up items in a task list, and assign tasks to teammates with a @mention.



#### *Decisions Template*

The Decisions template helps to stream line decision making on projects. This template records each direction that team has considered as well as the pros and cons for any future reference. Users will also have the ability to assign a single approver who ultimately makes the call on decisions.

### Others

There are multiple templates to choose from. Before creating from a blank page, be sure to browse the featured templates to cut down on time creating a page.

## Section 6: Editing

When editing a page, important consideration should be given to what tools are at the user's disposal such as the Toolbar.

### Toolbar

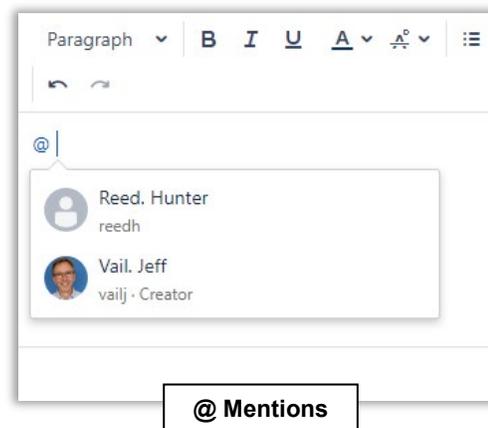
When creating a page, whether it be a blank page or from a template, users will have access to a tool bar to add and edit features on their page.



- A. Select different Headings, Paragraph, Preformatted, or Quote options
- B. Choose between text styles such as Bold, Italics, Underlined text, Text color, as well as Strikethrough, Subscript, Superscript, and Monospace.
- C. Bulleted or Numbered lists
- D. Task User: Use the @Mention, Assign a task, and a Due Date on a particular page creation project
- E. Indent spaces both left and right
- F. Choose orientation of text to be left bias, center bias, or right bias
- G. Page Layout: Choose different layouts for a page such as dividing the page into columns as well as adding separate sections to insert columns
- H. Insert Images, Links, Tables, and Macros such as a Status feature, Task Lists, Table of Contents, etc.
- I. Undo and Redo options

### @ Mentions

Mentions call a user's attention to a piece of content. In Confluence, users can tag a fellow team member in any piece of content within confluence as long as the member(s) the users are wanting to tag have a confluence license. By simply inputting the @ symbol followed by a user's name (@UserNameHere), this will email said user of any comment, page, project, or task that their team member has tagged them in.



## **Collaborative Editing**

Confluence allows multiple users to access the same content in real time. This is because all confluence content lives online. Therefore, multiple users can edit the same piece of content at the same time. This is referred to as Collaborative Editing.

## **Using Headings**

Use headings (not bold, font size, etc.) to structure content on a page (similar to Word and other best practices). The use of specific headings can help with visual cues when on a particular page. Headings can alert the reader to important information.

## **Focus**

Don't get too fancy, focus on content over style.

## Section 7: Commenting

Commenting allows users to remark on content, add important information, ask questions, and generally drive collaboration and teamwork. When commenting on content within Confluence the creator as well as any watchers of the page will automatically be notified via email. There are two types of comments, page comments, and inline comments.

### Page Comments

Page comments can be added to the bottom of a page that a user wants to comment on. Here's how to leave a page comment:

1. Type the comment in the comment field at the bottom of the page.
2. Optionally, choose **Preview** to see how the comment will appear.
3. By default, **Watch this page** is ticked. This means the user will start receiving notifications about the page. Uncheck it to not watch the page.
4. Choose **Save (Ctrl+S or ⌘+S)**.

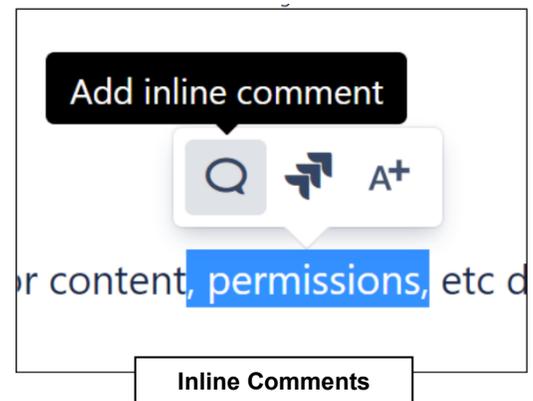
Other users can reply and/or like comments, and the user or a space administrator can edit the user's comment(s).

### Inline Comments

Inline comments are comments that can be made on a specified area of a page or text only when in "View Mode". Here's how to leave an Inline Comment:

1. Highlight the text desired to comment on and wait a few seconds for a menu to appear above the selected text.
2. Choose the **Add Inline Comment** button that appears above the highlighted text.
3. Type the comment and choose **Save (Ctrl+S or ⌘+S)**.

The selected text will appear with a yellow highlight indicating an inline comment; choose any highlighted text on the page to display the related comment(s).



Just like page and blog post comments, others can reply to, or like, the inline comments, and the user will be notified when they do.

# Glossary

Name	Definition
<b>Collaborative Editing</b>	Editing on a space or page that can be done by the user and other users simultaneously.
<b>Inline Comments</b>	Comments that can be left for a particular area or section on a page such as highlighting specific text, headings, or whole paragraphs.
<b>Pages</b>	Allows a user to capture and share information in Confluence. Pages are found within a Space.
<b>Parent Page</b>	A top level page is called the parent page, and any pages under it are considered its children.
<b>Spaces</b>	Spaces are Confluence's way of organizing content into meaningful categories. Spaces can be thought of like having different folders to put work in.
<b>Space Directory</b>	Allows a user to see and filter all the spaces in the Confluence site.
<b>@ Mentions</b>	This feature calls a viewer's attention to a piece of content.

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