Confluence Quick Start Guide

An Introduction to Confluence Spaces

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What is a Space

Content in Confluence is organized into spaces. There are two types of spaces:

- *Global* spaces are areas where you can put information that groups of people can view and interact with. These groups can be "everyone" or a "class" or some other predetermined list of participants. Global spaces are listed on the Dashboard. There is no limit to the number of global spaces you can create within Confluence!

- *Personal* spaces belong to a particular user. Personal spaces are listed in the People Directory. They can be private or open, depending on how the owner sets them up.

Confluence treats each space as an independently managed wiki. What this means is that each space functions autonomously within your site. **Each space:**

- Has its own pages, news, comments, bookmarks, RSS feeds and mail.
- Has its own access control settings which are set by the creator of the space and control who can see the space and who cannot.
- Can be separately exported PDF, WORD, HTML or XML.

You can view global spaces within a site on the Dashboard. You can also group global spaces together into 'Team or Class Spaces' to enable easy access to the content.

Spaces:	My	Team	New (1)	All			
Confluence (DOC)							
Confluence 1.4 User Guide (CONF14)							
Confluence 2.0 User Guide (CONF20)							
Documentation Staging (DOCPRIV)							
Documentation Staging 2 (DOCPRIV2)							

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Creating a Global Space

To set up a new global space:

Click "Create a Space" [Create a space] below the list of spaces on the Dashboard.
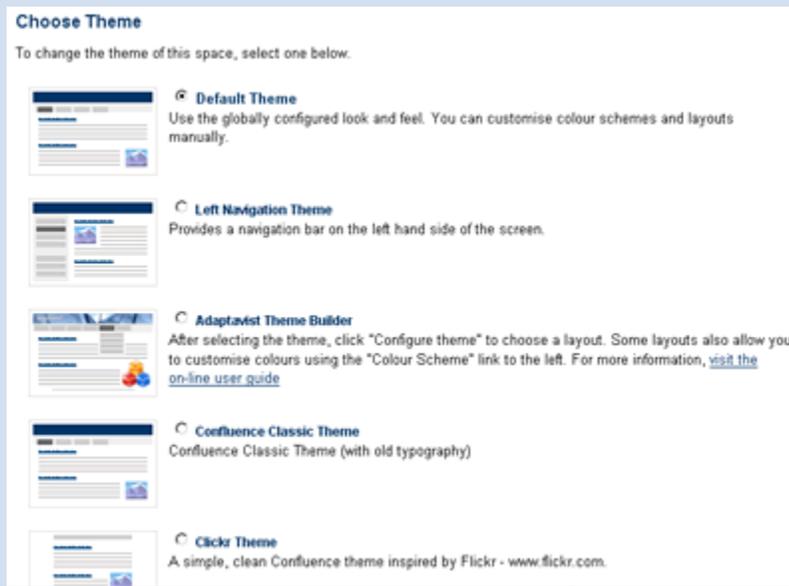
Enter the following information into the "Create Space" dialog screen:

- **Space Name**
  Space names do not have to be unique

- **Space Key**
  Simple keyword identifier
  (A-Z, a-z, 0-9) Used for linking between pages
  A Space Key MUST be unique in Confluence

- **Permissions**
  Me – you alone
  Registered users – Anyone logged into Confluence
  Anonymous – Anyone
  Permissions can be changed after the space is created

Enter a space name

Enter a space key

A space's **key** is a short version of its name, used to link to it quickly. It must be unique globally.

Example: A Development Space might have a key of DEV.

Who can use this space?

You can customize these permissions once the space is created.

Choose who can **view and comment on** content:

☑ Me
☑ Registered users - anyone logged into Confluence
☐ Anonymous - anyone, logged in or not

Choose who can **contribute** (create and edit) content:

☑ Me
☑ Registered users - anyone logged into Confluence
☐ Anonymous - anyone, logged in or not

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- **Theme**
  Select a "look and feel" for your space

Click the "OK" button

The "Home" page of the new space is displayed

**Click "OK"**

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Working with Spaces

Viewing All Spaces

Once you login, the list of spaces you have permission to view is displayed on your Dashboard under the spaces section. If you do not login, you will be treated as an 'anonymous user' and only those spaces to which an anonymous user has 'View' permission will be displayed on the Dashboard. Permission to a space is granted by the Space Administrator.

The list of spaces is displayed under tabs :

- **My Spaces** : Spaces you marked as favourites

- **New** : New spaces added to the site in the last seven days.

- **All** : All the spaces on the site.
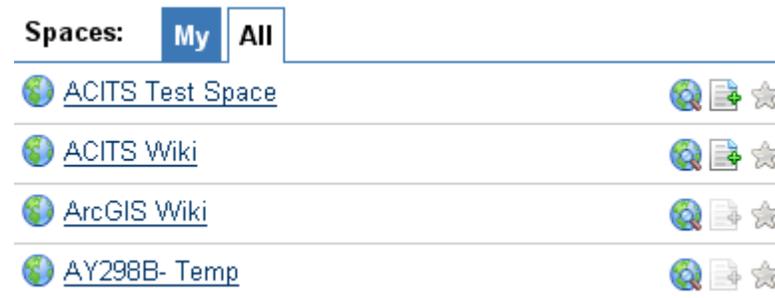
- Additionally, a list of personal spaces is available in the People Directory.

Go to the Dashboard from any page on your site simply by clicking the logo beside the page title or via the breadcrumb list located at the top of every page.
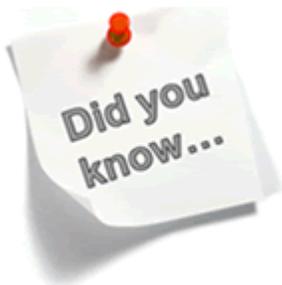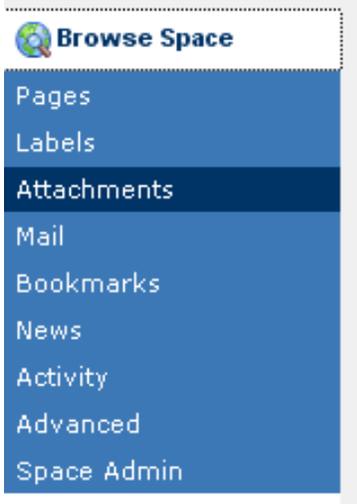
You can use the "Spaces List" Macro to generate a list of spaces on any page in Confluence.

Enter {spaces-list} into the page and a list will be generated on the page.

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Browsing a Space

You can browse a space from either the Dashboard or from inside the space itself by clicking on the "Browse Space" icon: located at the top of every page. The tabs of this view are:

1. **Pages**
   (Alphabetically, updated, tree view)
2. **Labels**
   (List of labels used on pages in the space)
3. **Attachments**
   (Find, view details)
4. **Mail**
   (View, fetch, delete)
5. **Bookmarks**
   (View)
6. **News**
   (View)
7. **Activity**
   (View)
8. **Advanced**
   (View, edit, manage, export, etc)
9. **Space Administration**
   (Management functions)

Here is the same view in another "theme"…

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Viewing Space Details

1. **Click the "Browse Space" link for the space**
   This is at the top of every page and beside the space link on the dashboard
2. **Go to the "Advanced" tab and click "Space details"**
3. **The following is a list of possible details that are displayed:**

   The Name **of the space.**

   The Key **used to refer to the space.**

   Any Labels **defined for this space.**

   The Homepage **of the space.**

   The Creator **of the space.**

   Space Description:

4. **Here is an example of the listing:**

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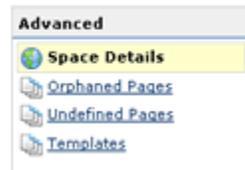
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Editing Space Details

You need to be a space administrator to edit the details of a space. To edit the details of a space:

1.	**Click on the "Browse Space" link for the space**

2.	**Go to the "Space Admin" tab and click "Edit Space Details"**
	You can:
	
	Enter a different name for the space
	Enter or Edit the space description
	Select a new home page from the drop-down menu
	    If you set this field blank, the home page becomes the
	    "Pages" tab of the "Browse Space" page
	You cannot edit the key or the creator's name

3.	**Click "Save"**
4.	

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# Managing Spaces

Viewing Space Activity

In Confluence version 2.3 and later, statistics on each space's *activity* are available such as:

1. How many pages and news posts have been viewed, added or edited
2. Which content has been most frequently viewed
3. Which content is most frequently edited
4. Which people are the most active contributors/editors of content

To View a Space's Activity

1. **Click on the "Browse Space" link for the space.**
2. **Go to the "Activity" tab**

The number of pages and news posts that have been viewed, added and edited will be displayed graphically, showing trends over a period of time, e.g.:

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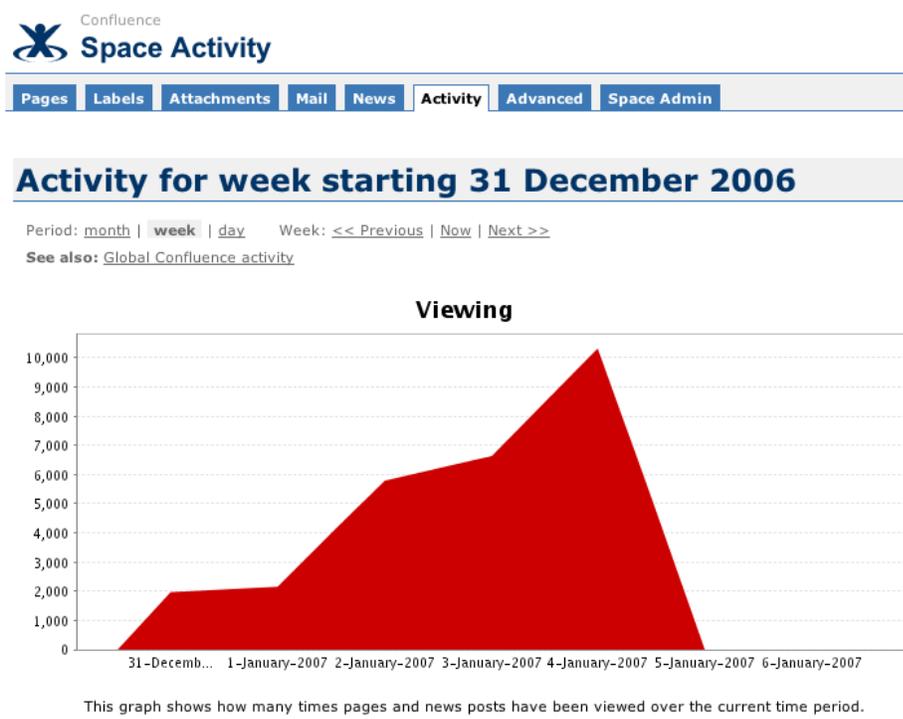
The top 10 most popular and most active pages and/or news posts will be listed, with a link to each, e.g.:

> **Most popular content (Views)**
> 1. 🏠 Confluence Documentation Home (2262)
> 2. 📄 Set JAVA_HOME variable in Windows (1180)
> 3. 📄 Confluence Installation Guide (687)
> 4. 📄 Remote API Specification (467)
> 5. 📄 User Macros (436)
> 6. 📄 Installing Confluence Standalone (385)
> 7. 📄 JIRA Issues Macro (370)
> 8. 📄 Administrators Guide (353)
> 9. 📄 Dynamic Tasklist Macro (335)
> 10. 📄 Frequently Asked Questions (320)

Moving Content from one Space to Another

While each space in Confluence functions independently, Confluence is flexible enough to let you move content easily between spaces.

Move a Page from one Space to Another

1. **Go to the page and click the "Edit" tab**
2. **Click "Edit" beside "Location"**
3. **Select another space and click on it**
4. **If you want a "Parent Page" click on the "Choose Page" icon 🔍 and select a page**   **If you want the page to be "Stand-Alone", leave the field blank**
5. **Click "Save"**

Any links to the page from the current space will automatically be renamed.

Move a Family of Pages from one Space to Another (A Parent and all Child Pages)
Follow the same directions as above, except:

1. **Check to box titled "Move Children"**
2. **Click "Save"**

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Move an Attachment

You can move an attachment from its current location to any page within the same site.

1. **Go to the page that contains the attachment** **Click on the "Attachments" tab**
2. **Click the "Edit" link beside the attachment** **Rename the attachment in the "File Name" text field (optional)** **Update the existing comment or enter a new one under "New Comment" (optional)**
3. **Click on "Choose a Page" and select the page you want to move the attachment to**
4. **Select "Yes" under "Update Links" to make sure all links to the attachment work (If there are no links to the attachment, you can select "No")**
5. **Click "OK"**

View Edit Attachments (2) Info

Edit Attachment

This page allows you to move an attachment, rename an attachment, or both.

File Name

childrenhide.gif

Update the file name here.

New Comment

Show children

Update the comment here.

Page

Specify the page you want to move the attachment to.

Update Links?

Links to this attachment from other pages will no longer work on rename/move. To prevent this, these links need to be updated. Update links?

○ Yes ⦿ No

OK Cancel

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Deleting a Space

Deleting a space permanently removes the space and all of its contents. To be safe, create an XML Space Backup before deleting a space. Once deleted, there is no way to recover a space unless you have made an XML backup.

1. **Click on "Browse Space"**
2. **"Go to the Space Admin" tab**
3. **Click on "Remove Space" under the "Space Operations" heading**
4. **Click "OK"**

Converting a Global Space to a Personal Space

1. **Go to the space and click on "Browse Space"**
2. **Go to the "Space Admin" tab**
3. **Click the "Edit Space" link**
4. **Under "Convert to Personal Space"**   **Choose "Update Links" (optional but recommended)**   **Choose the "User" who will own the space**

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Administering Spaces

To View the Space Administration Menu

1. **Click on the "Browse Space" link**
2. **Go to the "Space Admin" tab**

Administering Personal Spaces

Space Operations

/ Edit Space Details
✎ Edit Space Labels
🌐 Remove Space
🗑 Trash

Security

🔒 Permissions
🔒 Restricted Pages

Look and Feel

🖼 Themes
🎨 Colour Scheme
🪟 Layout

1. **Space Operations**
    o **Edit a space's details**
    o **Edit space labels and team labels**
    o **Remove a space**
    o **Purge or restore content from trash**
2. **Security**
    o **View or set space permissions**
    o **View restricted pages**
3. **Look and Feel**
    o **Apply a theme**
    o **Change the color scheme**
4. **Edit the space's layouts**

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Administering a Global Space

1. **Space Operations**
   Edit a space's details
   Edit space labels and team labels
   Remove a space
   Purge or restore content from trash
2. **Security**
   View or set space permissions
   View restricted pages
3. **Mail**
   Manage mail accounts
   Import mail
4. **Look and Feel**
   Apply a theme
   Change the colour scheme
   Edit the space's layouts
   Change the space's logo
5. **Import**
6. **Importing Pages from Disk**

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Dashboard > Create Space   [Search]

✖ Create Space

Welcome Sarah Maddox | Preferences | Administration | Log Out 🖨

Content in Confluence is organised into **spaces**.

A space is where your pages live, where your news is posted, and where your mail is archived. Permissions determine who can view or contribute to the content of a space.

There is no limit to how many spaces you can create.

Enter a space name

[   ]

Enter a space key

[   ]

A space's **key** is a short version of its name, used to link to it quickly. It must be unique globally.

Example: A *Development Space* might have a key of *DEV*.

Who can use this space?

You can customize these permissions once the space is created.

Choose who can **view and comment on** content: Choose who can **contribute** (create and edit) content:

☑ Me   ☑ Me
☑ Registered users - anyone logged into Confluence   ☑ Registered users - anyone logged into Confluence

Choose Theme

To change the theme of this space, select one below.

⊙ **Default Theme**
Use the globally configured look and feel. You can customise colour schemes and layouts manually.

○ **Confluence Classic Theme**
Confluence Classic Theme (with old typography)

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Creating a Personal Space

Your *personal space* is a place where you can publish your own pages and news items. Once you have set up your personal space, Confluence users can reach it by clicking your name in the People Directory, or you can keep it as a private space.

Creating Your Personal space

1. **Click the "Preferences" link below the breadcrumbs at the top of the page**
2. **This displays your profile**

3. **Enter details about your space:**

   Who can view it (this can be changed at any time)
   Who can contribute to it (this can be changed at any time)
4. **Choose a Theme**
5. **Click "Create"**

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Create Personal Space

Your **personal space** is your own private workspace within Confluence.

You can optionally let other people **view** or **contribute** to it.

Who can contribute to your personal space?

You can customize these permissions once the space is created.

Choose who can **view** content:

☑ Me
☑ Registered users - anyone logged into Confluence
☐ Anonymous - anyone, logged in or not

Choose who can **contribute** (create and edit) content:

☑ Me
☐ Registered users - anyone logged into Confluence
☐ Anonymous - anyone, logged in or not

Choose Theme

To change the theme of this space, select one below.

◉ **Default Theme**
Use the globally configured look and feel. You can customise colour schemes and layouts manually.

Where is my personal space?

Once created, your personal space will be accessible (to anyone who can **view** it) at:

http://confluence.mycompany.com/display/~me@mycompany.com

[Create] [Cancel]

Once you have set up your personal space, you can return to it any time by clicking your name (next to the word 'Welcome' at the top of the page). Now you can start adding pages to your personal space. You may also want to upload your photo.