

LearnByCartoon.com Confluence Training. Episode Guide. The Confluence Dashboard, Global Sidebar & User Interface.



The screenshot shows the Confluence dashboard with a blue sidebar on the left and a main content area. The sidebar contains navigation items with red numbered callouts: 1 (Confluence), 2 (Search), 3 (Home), 4 (Activity), 5 (Your work), 6 (Spaces), 7 (People), 8 (Add-ons), 9 (Settings), 10 (Site administration), 11 (Give feedback), 12 (Opt out for now), 13 (MY SPACES), and 14 (Direct Sales). The main content area features an 'Activity' feed with updates from Brian Richards, Kendra Kumar, Kimberly Smith, and Joey Kentebe. A cartoon character in a blue shirt and purple vest points to the activity feed. On the right, there is a 'Create Space' button, a welcome message, the LearnByCartoon logo, and an 'Upcoming Events' section with 15 events.

1. The Global Sidebar / Home

The Sidebar, on the left of the screen, is called the Global Sidebar. This is the main menu system for Confluence

2. Search

Below the homepage symbol, is the Search icon. Click this to carry out a search and to access the advanced Search results page.

3. Create Content button (+ plus symbol)

Below the Search symbol is the Create icon, shown as a plus symbol. By clicking the create icon, you can create content immediately, inside any Space on your site, using the Select Space drop-down menu. However, if you are new to Confluence, it's usually best to first Open the Space where you want to create your new content, and press the Create button from there. This ensures that your content is created inside the correct Space.

4. The Activity Feed

The Activity section shows All, and Popular Updates, that have been made, in real time.

All Updates Feed

The All Updates feed shows what's happening around your organization. This is similar to the FaceBook homepage feed. This shows Pages created or edited, Blog Posts published for Team Communications, plus any other activity.

If we look at the differences in some of the activity on this list, notice that some items include a helpful short comment, underneath the page name, while some do not.

Whenever you edit a page or a blog post, on the bottom of the page, next to the Publish button, you will notice a field that says, "What did you change?".

You should make it a habit to always enter a short comment in the “What did you change” field, when editing pages, as that short comment also shows up here, on the Activity feed. This immediately changes the Activity feed from a simple list of updates, to a list of updates that also tell the viewer what that change actually means. This increases understanding, and improves communication, for everybody.

The Popular Feed

Next, the Popular feed highlights pages and other items in confluence, that are the most liked, or have the most comments.

To get the most from the Popular Feed, teams should make full use of the social networking features, such as liking pages, or adding comments.

Commenting on Pages or Blog posts can actually reduce the amount of Email generated by your team. It’s also a more direct, and faster way to highlight good work that’s been done, and for engaging in team discussion. Both of these will improve team collaboration.

Pages and blog posts with the most comments or likes, will feature higher in the list.

5. Your Work

On the Global Sidebar, the “Your Work” section, shows what pages you have recently Worked on, recently visited, or saved for later. This helps you to pick up your workflow, from wherever you left-off.

Recently Worked on, and recently visited are quite straightforward.

On the top of all pages in Confluence, you will notice the “Save for Later” star icon. By clicking the star icon, the page will be added to this “Saved for Later” list.

6. Spaces

To open our Space Directory, just click on “Spaces” from the Sidebar. Spaces are containers for related information. Each Space can be thought of as a mini-site or subsite within Confluence. Every Space should have at least one category label, which describes what the Space relates to. Categories build the Navigation structure for the Space Directory, automatically.

Inside a Typical Space

As soon as you open a Space, notice that the blue Global Sidebar is reduced in size, and the grey “Space Sidebar” takes its place.

The first page that you’ll see when browsing a Space is called the Space Overview page.

What appears on this page is entirely determined by the Team who created the Space. However, the Overview page will usually be an information page of some sort.

We can see the Page content of the Space, by clicking on the Pages link, which will open our Page Tree Browser.

Pages are the main content types for most Spaces.

Beneath the Pages link in the Space Sidebar, is the Blog link.

Blogs are used for news and communications. Not all Spaces will necessarily have a Blog. They are used when there is a need to communicate news and information related to the Space, its contents, or the team that owns it.

The rest of the content shown in the Space Sidebar can vary substantially from Space to Space. Teams have the ability to choose from many types of content available, which can be added to the Space Sidebar.

7. The People Directory

Next in the Sidebar, we have the People directory link. This lets you find other Confluence users on your site. You can also filter this list to show people with Personal Spaces. Personal Spaces allow users to store pages relevant to them, or their particular role in the organization. Not everyone in your organization will necessarily have their own Personal Space, or have a need for one.

8. The Add-Ons Link

In the global Sidebar, the Add-ons link displays any extra applications that have been added to Confluence.

9. Administrator Settings (Displayed to Admins only)

The two cog wheel icons, called Settings, and Site Administration, are only available for Confluence Administrators. The Administrator is the person in overall control of the Confluence Site. These options give access to Site Administration functions.

10. My Spaces List

To add the Spaces that you'll use most often to your "My Spaces" list, in the Global Sidebar, click on the Star icon for the space, to add or remove Spaces to your My Spaces list.

11. Notifications Workbox

The Bell icon will open your personal Notifications Workbox. This is a list of Tasks or other notifications that are specific to you. Click on each notification to open it. You will be notified about items such as tasks assigned to you, or when you have been mentioned on a page, or when content that you are watching has been changed.

12. Switch Apps

The “Switch Apps” icon allows you to switch between your most recently visited Spaces, and also any other Atlassian products that your organization might be using, such as Jira. The Help icon gives you access to the Atlassian Online Help system for Confluence, and other items such as the handy list of Keyboard Shortcut keys that are specific to Confluence.

13. Help

Access Confluence Help pages from here.

15. Your Profile and Settings

You can access your Personal Space, if you have one from here. There is also a handy link to Your Recently Viewed pages, plus your Profile information, and your Settings.

15. Team Calendars (Add-On)

In the Upcoming Events area, you can see my schedule, from a list of Team Calendars that I’m following. Team Calendars is an optional Add-on, so you may, or may not have this installed.