

# A USER'S GUIDE TO CONFLUENCE

at **TechCo, Inc.**



*The official Training Guide for **TechCo, Inc.***

*Written and Edited by **Elizabeth Hyde***



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A A User's Guide to Confluence with **TechCo, Inc.**

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# Chapter 1: Getting Started with Confluence

*Now that you've joined TechCo, Inc. use this guide to begin your journey with Confluence and start creating and collaborating with your team!*

## The History of TechCo, Inc.

TechCo, Inc. is an American-founded, multinational technology company specializing in personal technology solutions - from hardware to software, and venturing into security and device management at the turn of the decade. TechCo, Inc. leads the world in international technology-based revenue. As of 2021, TechCo, Inc. has standardized the offering of a fully hybrid work environment, allowing their employees to work from home, in office, or a bit of both. This increases the need for accessible training materials for every topic, as TechCo, Inc. can no longer depend on in-person training sessions for all new employees.

TechCo, Inc. was founded by Zoey Carneers and Stanley Chancer in 1987 in the heart of Boulder, CO as Techno Co-op. Their goal was to develop and sell the widest offering of personal technology solutions. It was incorporated by Chancer and Carneers as TechCo, Inc. in 1988 and sales started to steadily grow.

Despite the company's growth, TechCo, Inc. remained an underdog for years, never quite as widespread as the giants in the industry, having had a later start in the game. However, when TechCo, Inc. went through IPO in 1997, it was instantly sweeping the market and taking down assumptions by the established technology corporations. Dubbed "the craft beer of the tech industry,"<sup>1</sup> TechCo, Inc. was leading the way for smaller companies to grow in the shadows of the giants, like Apple and Microsoft. TechCo, Inc. was smaller, but more specialized and with a wider range of products designed specially for cross-platform functionality - something large companies were hesitant to do as it could potentially lower their current market share. Consumers across the world recognized TechCo, Inc.'s commitment to putting the customer first and slowly they became one of the giants they had worked so hard to survive underneath.

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<sup>1</sup>Quote by Weil, *The Street*. See References on page 23



As the market for personal, corporate, and educational device management blew up with the **Covid-19** pandemic, TechCo, Inc. saw itself expanding upon its current offerings of quality hardware and software to include mobile device management programming. There was consumer concern about a new entity in the market, but many had been well served by TechCo, Inc. in the past and were willing to take the risk with their new developments.

With great growth, comes great responsibility to the consumer. TechCo, Inc. is determined to remain a customer-first company, and that begins internally with making sure the employees are well trained, fairly compensated, and proud of their work and the company. TechCo, Inc.'s goal is to create comprehensive training solutions for their employees so they feel confident in their skills and can progress and grow within the company at an accelerated rate.

## An Introduction to Confluence

### What is Confluence?

Confluence by Atlassian is a content creation, team collaboration, and information organization tool all in one. Confluence allows companies and individual users to make the most of their team's combined efforts in shared work spaces that can be used to create and share information in a variety of dynamic ways.

Confluence allows you to separate your information into spaces and cascading page levels, with navigation tools for every design preference. The goal is to help your team create the best content management platform possible, both attractive and efficient.

Confluence is a software program developed and managed by Atlassian, a software company based out of Australia. The first release of Confluence in 2004 touted "Confluence is a team workspace where knowledge and collaboration meet"<sup>1</sup>. Atlassian wanted to provide a tool for employees at every level: from software developers and project managers to administrators and human resources.

Confluence is written in Java programming language and it can be integrated with many other platforms offered by Atlassian, such as Jira – an all-in-one bug tracking and project management tool. Working at TechCo, Inc., you'll become familiar with the Jira Service Management tool used for help tickets by the IT department.

Confluence is considered groupware, a form of collaborative software designed to help people working on a common task work simultaneously on the same project. Confluence can be further categorized as a real-time collaborative editing platform, meaning multiple users can engage in live, reversible editing of a single page. In the images that follow,

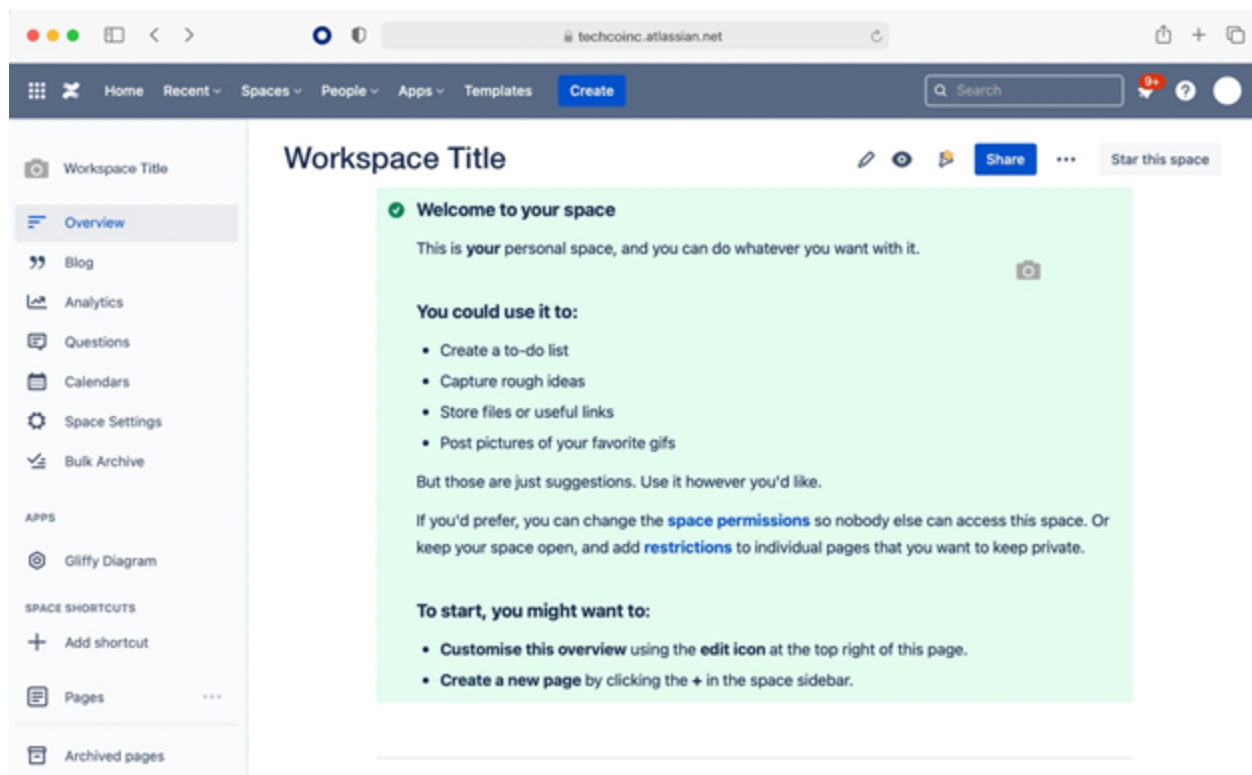
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<sup>1</sup>Quoted *Confluence Basics*. See References on page 23

you'll see that the users currently in the page editor are displayed at the top. This allows users to collaborate more effectively and share ideas quickly.

## What It Looks Like

Confluence by Atlassian operates in a variety of “Spaces”. Each of these spaces acts as a different base in which pages of information can be created, stored and organized. Each user has a personal workspace, and within a company like TechCo, Inc., each department also has their own space.



## Menu Bar

The menu bar across the top of the screen is the main navigation pane for passing between different spaces, people, and apps. The collection of nine squares in the top left of the menu bar opens a drop-down menu with other Atlassian software under the same company license, allowing you to quickly switch between platforms.

The following tabs across on the menu bar allow you to navigate to different areas under the TechCo, Inc.Confluence license:

- **Home**: brings you to a landing page featuring your starred and recently visited spaces and pages. The spaces listed on the home page are shown alphabetically

with the option to show more or view all. View all will bring you to a new landing page with a full list of all spaces within your company's license.

- **Recent:** opens a drop-down menu with the most recently visited pages and a filter search bar. An additional submenu allows you to toggle between your recent options: visited, worked on, drafts, and starred.

*Note: Starred spaces and pages are those that you'd like to locate more quickly, similar to bookmarking a page in the browser.*

- **Spaces:** opens a dropdown menu. This menu features your starred and recently visited spaces. Clicking on one of these will bring you to the overview page for this space.
- **People :** shows recent collaborators as well as any teams you are a part of within the software.
- **Apps:** features standard options like calendars, analytics, and questions, as well as popular apps your company may have included such as Salesforce or Google Drive.
- **Templates:** the most useful for new users tasked with creating a variety of content pages. This tab provides a large variety of pre-formatted templates titled to mark their best use case. Examples of handy templates include: meeting notes, how-to articles, project plan, or brainstorming.
- **Create:** this is where the magic happens. When selecting create from the main menu bar, the page will automatically be built within your most recently visited space. This can easily be changed in the creation process, but should be paid attention to whenever trying to quickly create a new page. Wouldn't want to accidentally build your page in the HR space instead of marketing!

## Navigation Pane

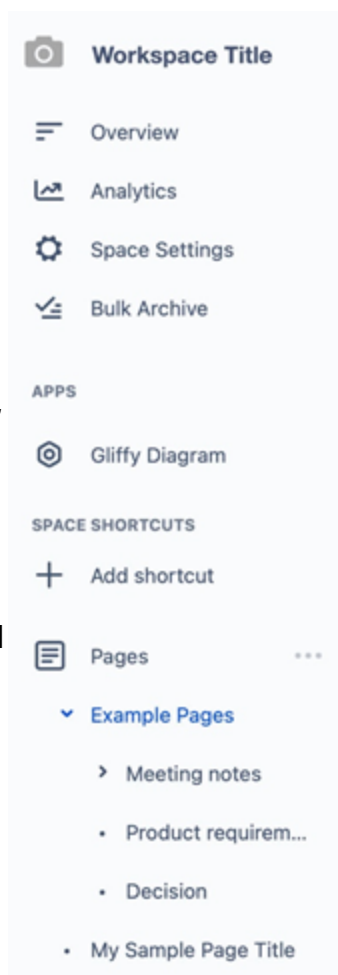
Next, we take a look at the left-side navigation pane. This navigation page is used to travel between the different areas within a specific space. The opening landing page is the **Overview**. This operates like the home page and can be customized just like any other page within the space. Generally, the Overview will contain a summary of the types of content in that space as well as some quick links to frequently visited pages within the space.

*One example is for the HR space to have a link to the benefits, payroll, and help pages within their space, as those are the pages for which readers are most frequently visiting that space.*

After the overview, there are a few sections that have a use case specific to each user. In your role at TechCo, Inc. you will not be needing them very often. These sections are described as follows:

- **Blog**: start a blog to share announcements or other timely information like status reports.
- **Analytics**: Data collected by Confluence on your user habits. The analytics are specific to each space and the page is not directly editable
- **Questions**: Post a question and receive answers from a variety of individuals, then share it with the team
- **Calendars**: Assign and update calendars for events, birthdays, or meetings that you can share with your team or utilize on your own to stay organized
- **Bulk Archive**: Allows for archiving pages more efficiently through a checkbox system, rather than having to touch on each page individually. Archiving pages is useful when the information on the page is no longer relevant, but you do not want to lose the history or information stored on that page by deleting it.

Also within this section is the space **Settings**. This allows you to customize the space design, permissions, and content designs. The space settings are generally managed by a systems administrator within the company, so do not adjust settings without first checking with your department head.



The **Apps** section is also modified by the system administrator to include other useful tools that can be integrated into Confluence.

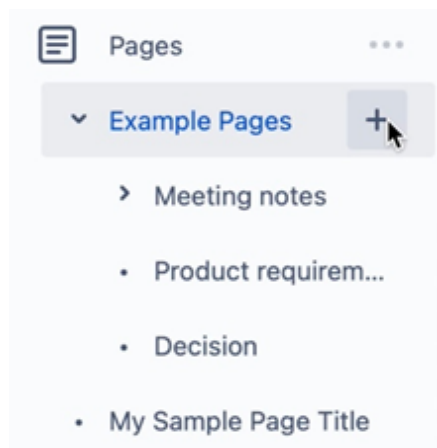
The next section, space **Shortcuts**, allows the users to link frequently visited resources such as outside web addresses or pages within other spaces.

The final section is the most important. This is the **Pages** section. Within the Pages section is where all the user-created content will live. This section hosts collaboration pages, meeting notes, info-wikis and more. Most spaces start out with a tab of sample pages that can be deleted later, but an established space, like many that you will be working within at TechCo, Inc. will already have a list of pages.

## Pages

The first level of pages is known as the parent pages. These pages will have sublevel pages sorted underneath them, very similarly to the way email applications sort folders and subfolders. These subpages are called child pages. The parent page, if it already has child pages, will have an expand arrow (>) to the left of the page title in the navigation pane. If there are

not any child pages, it will be a solid bullet point (•). To expand out the child pages, click the expand arrow and the page titles will appear below, listed by order of creation. You can easily rearrange the order and level of pages by dragging and dropping the page to wherever you want it to be located within the list. To add a new child page beneath a parent page, click on the plus sign that appears when you hover over the page title in the navigation pane.



Now that you know where all the pages live and how the space will look, let's move on to formatting a page.

**Let's go!**



## Chapter 2: Formatting a Page

Description text can be added at any line level on the page. Oftentimes, the top line of text gives a brief overview of the page topic.

*Note: To best view the items discussed on this page, click the edit button on the top right, or open a new blank page in your own workspace.*

Standard spacing for the Normal text format is 1.5 lines. The next line of text after hitting the enter or return key will be separated by a blank line, or double spaced, as seen above. Each heading format has its own set spacing standards.

own set spacing standards.

See how much farther Heading 3 is spaced from the text above it?

But then the spacing returns to normal on the next line when the text returns to a Normal text format.

While confluence supports the standard font styles, like **bold**, *italic*, underline, ~~strikethrough~~, subscript, and superscript, it also offers `code`, which is often used by technology companies to notate coding done within a software's design.

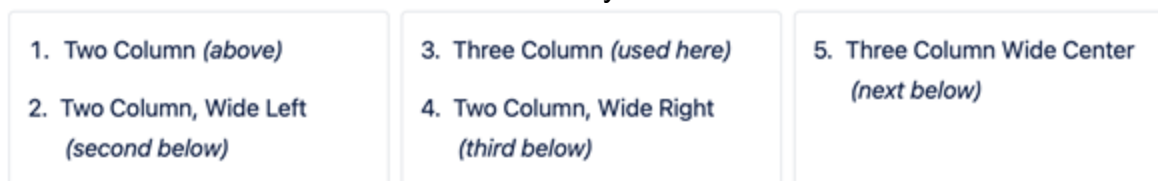
*Note: Keyboard shortcuts can be found by hovering your mouse over a button, or in gray next to an item in a drop-down menu.*

Bulleted lists and numbered lists work very similarly to any word processing program you've used, allowing for the tab button to indent to the next level.

<ul style="list-style-type: none"><li>• First level<ul style="list-style-type: none"><li>◦ Second level<ul style="list-style-type: none"><li>▪ Third Level<ul style="list-style-type: none"><li>• Fourth Level<ul style="list-style-type: none"><li>◦ And so on...</li></ul></li></ul></li></ul></li></ul></li></ul>	<ol style="list-style-type: none"><li>1. One<ol style="list-style-type: none"><li>a. A<ol style="list-style-type: none"><li>i. Roman 1<ol style="list-style-type: none"><li>1. And so on</li></ol></li></ol></li></ol></li></ol>
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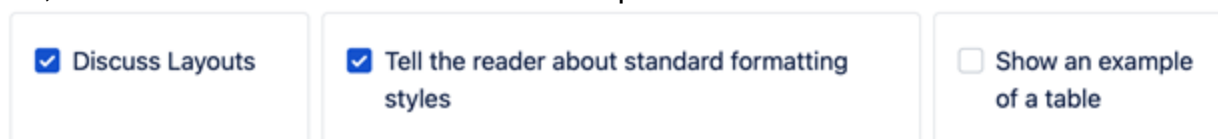
As you can see above, I used a different format, creating two columns, to maximize my space usage. These are called layouts. They function similarly to a table without showing any published borders.

There are five not editable formats for the layouts:

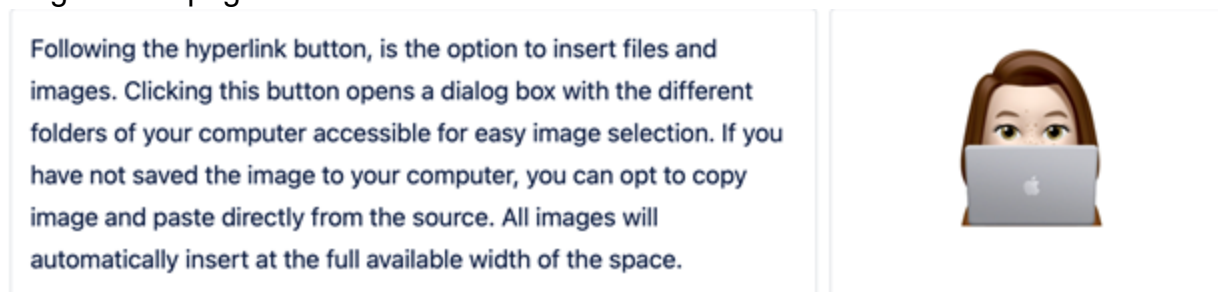


Each of these formats can be used for a variety of page designs and are especially useful when designing pages with graphics that you may want to place beside text instead of on its own line.

In addition to the bulleted and numbered lists, Confluence also offers Action Items. These are bulleted lists that feature checkable boxes. The unique feature of this formatting is that you do not have to open the page editor to change the box from unchecked to checked and vice versa. This allows users to make pages that cannot be edited by others, but still allow them to mark tasks as complete.



Going back to the order presented on the formatting bar, after the action items you'll find the option to hyperlink text. When using this tool, you will select the text you want to hyperlink, click the button and paste the URL for the destination. Alternatively, Confluence also offers a search bar and list of suggested pages. This allows you to link to anywhere within the TechCo, Inc. Confluence licensed spaces. This is extremely convenient if you are creating content pages with cross-referenced information.



The @ symbol allows any user to tag another user on the page. The tagged user will then get an email notification, letting them know they have been tagged on a page and offering a preview of the tagged text. This is often used in conjunction with the action items to assign tasks to specific persons for completion.

Much like text and chat-based platforms, Confluence offers a variety of emojis for use in the page. They can be used to draw the readers' attention to key points or to add a bit of levity and color to a page.

Creating a table, the next option on the formatting toolbar, can add dimension and appeal to the design of a page. It can be used to compare, contrast, track or list just about anything. Here you see we have listed a few of the different sections of the formatting toolbar.

Section	Tools/Options	Uses
Text Styles	Headings 1 - 6, Normal Text	Organizing your content
Formatting	Bold, Italic, Underline, Strikethrough, Subscript, Superscript, Code	Emphasizing different text
Text Alignment	Left, Center, Right	Page Design
Text Color	Dark, Mid, & Light Tones of: Black/White, Blue, Teal, Green, Orange/Yellow, Red & Purple	Page Design, Emphasis

The automatic table formatting includes:

- Gray-Fill Heading Cells
- White-Fill Content Cells
- Equally Spaced Columns & Rows
- Black Text

All of this can be formatted and adjusted to create a table design that suits the page content. For example, on a page about the company's Green Initiative, you may want to have the heading cells a light green. This coordinates with the page topic and helps to draw the reader's focus to potentially key materials.

Finally, the last button on the formatting toolbar is the plus sign with the dropdown menu arrow. This button provides access to all of the other macros provided by Confluence, some of which we will get into in Chapter 3: Advanced Macros on page 15.

Once finished designing your page, you can click the blue Publish button and your page, or any future edits you make, will become viewable to visitors on the page. Don't worry about saving your progress as you go; Confluence autosaves your content every 30 seconds and it will be there if you open up the page editor after accidentally closing out. It will not, however, be visible to page visitors until you hit publish.







## Chapter 3: Advanced Macros

With Confluence, there are unlimited combinations of formatting styles and macros to make the most effective content delivery. While there are dozens of macros available in Confluence, this guide will focus on the most commonly used macros at TechCo, Inc. First, take a look at how to find the advanced macros on your page editor.

The screenshot shows the Confluence page editor interface. The top toolbar contains various icons for text formatting and insertion. A blue box highlights the macro dropdown menu icon (a plus sign with a downward arrow). A callout box on the right shows the expanded dropdown menu, which lists twelve macros: Code snippet, Date, Decision, Divider, Expand, Info panel, Jira, Jira roadmap, Quote, Status, Table of Contents, and Trello Board. At the bottom of the list is a 'View more' option. A 'Shortcut: Press "/" to insert items as you type.' is also displayed.

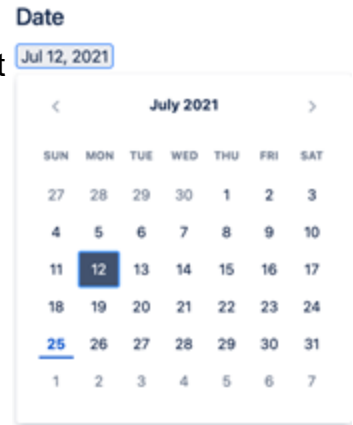
This dropdown menu features a quick selection of twelve macros and a view more option. Selecting view more opens a dialog box as shown below. The dialog box includes a separate navigation pane to sift between a variety of categorized macros, as well as a quick search bar to find a specific macro.

The 'Select macro' dialog box is shown. It has a search bar at the top right and a 'Help' link. On the left, there is a navigation pane with categories: All, Administration, Communication, Confluence content, Development, External content, Formatting, Media, Navigation, Reporting, and Visuals & images. The main area displays a grid of macro options, each with an icon, a title, and a brief description. The macros shown are: Activity Stream (Gadget URL), Advanced Roadmaps for Jira plan, Aha! roadmaps for Confluence, Assigned to Me (Gadget URL), Agile Wallboard Gadget (Gadget URL), Anchor, and Attachment Table. A 'Cancel' button is located at the bottom right.

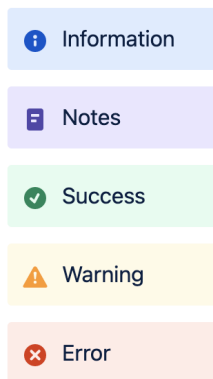
## Quick Select Macros

Of the quick select macros, the most important to know for your role at TechCo, Inc. are Date, Info Panel, Divider, and Table of Contents.

**Date** is straightforward. Selecting this macro allows the user to insert a preformatted date, with the option to change or update it by selecting the new date on a pop-up calendar. This macro is often used for meeting notes and deadlines.

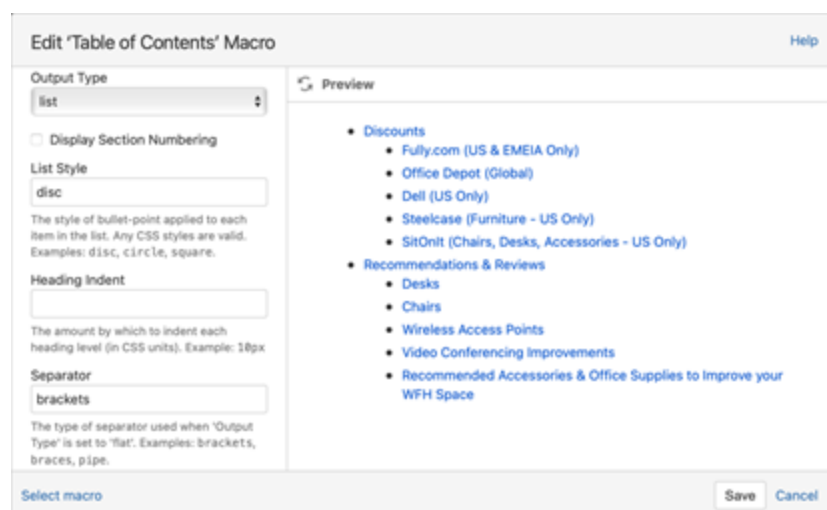


**Divider** is a design style macro. It allows the reader to make a distinguished divide between topics, sections, or any other type of content with a thin gray line that traverses the page. This macro is most useful when creating content pages for multiple offices or departments as you do not have to create each a separate page, but the distinction between them is still clear.

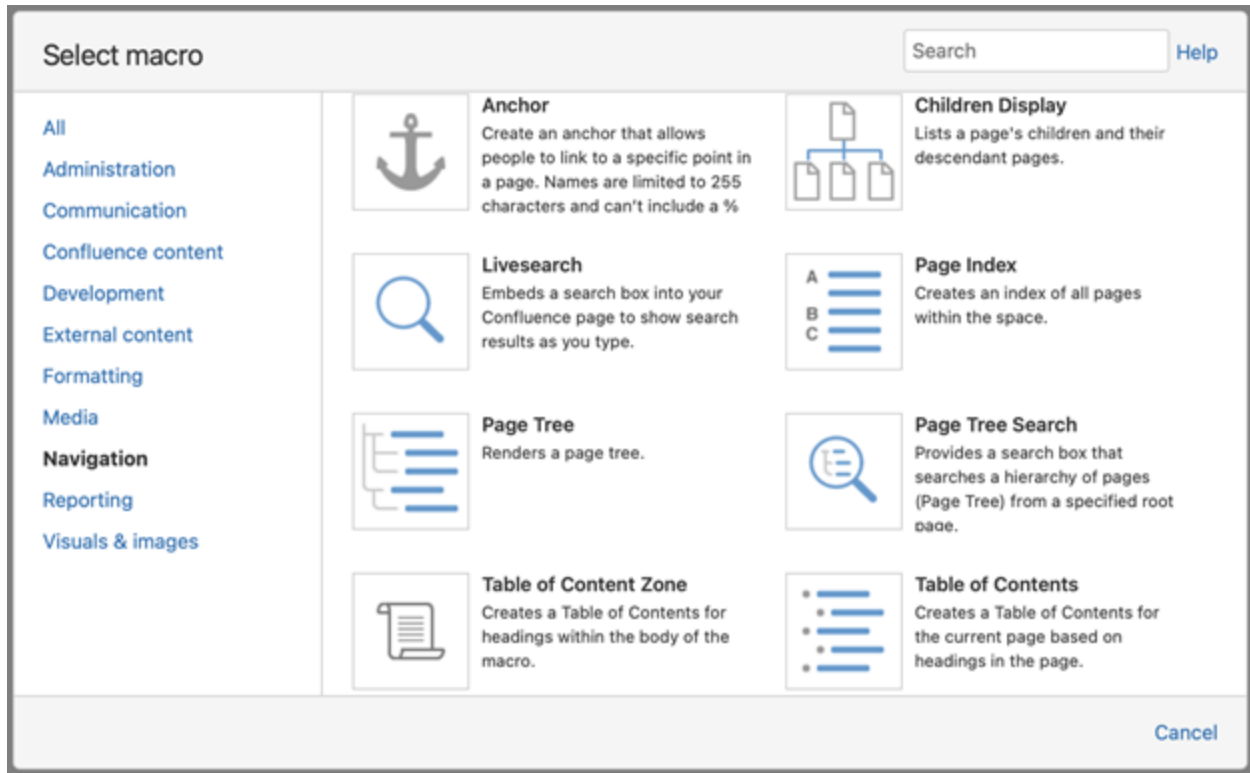


**Info Panel** offers a few different options within it. The primary purpose of an Info Panel is to draw the reader's focus to the primary information on a page. The color and icon associated with each info panel style is not editable, so using them appropriately is key. It may be a disclaimer, a warning, or simply a precursor necessary to understanding the relevance of the content. While the amount of text within the Info Panel is not limited, most successful info panels are only a few lines. Paragraphs of content should be allocated to normal text or their own page as the more text within the box, the less likely the reader will consider all of it valuable information and give it proper attention.

The **Table of Contents** is perfect for larger content pages. This allows the reader to navigate to a specific point on the page quickly and efficiently. The table of contents works best with pages that have distinct headings and subheadings for the content.



# Navigation



The navigation macros will be some of the most useful options when creating your content pages. The Table of Contents was discussed above, however, similar to that concept, the **Children Display** and the **Page Tree** help the reader efficiently locate information on a desired topic, especially if they are unfamiliar with the space.

*(Within the Meeting Notes Page)*

Table of Contents	Displays a list of headings within one page for ease of navigation on that page.	<ul style="list-style-type: none"> <li>• Date</li> <li>• Participants</li> <li>• Goals</li> <li>• Discussion topics</li> <li>• Action items</li> <li>• Decisions</li> </ul>
Children Display	Displays all of the child pages to the first degree beneath the page on which you are located.	<ul style="list-style-type: none"> <li>• Meeting notes</li> <li>• Product requirements</li> <li>• Decision</li> </ul>
Page Tree	Displays all parent and child pages for the space within which the page you are located on is found.	<ul style="list-style-type: none"> <li>• <b>Example Pages</b> <ul style="list-style-type: none"> <li>› Meeting notes</li> <li>• Product requirements</li> <li>• Decision</li> <li>• My Sample Page Title</li> </ul> </li> </ul>

The **Page Index** is similar to a Page Tree in that all pages within a space are included, but a page index is designed to mirror a traditional print index with alphabetical headings and pages sorted by title beneath those headings. This macro is designed for large spaces with a variety of content. This macro should be used on its own page, either on the overview to help readers immediately navigate to a desired page, or as a separate index located at the bottom of the page list.

## **Going Further**

With these macros to start, you have the tools to create a variety of complex content pages. Once you have mastered these macros, begin exploring all the other offerings Confluence has for use.

For a full list of the macros available under the TechCo, Inc. license, see Macros on page 25



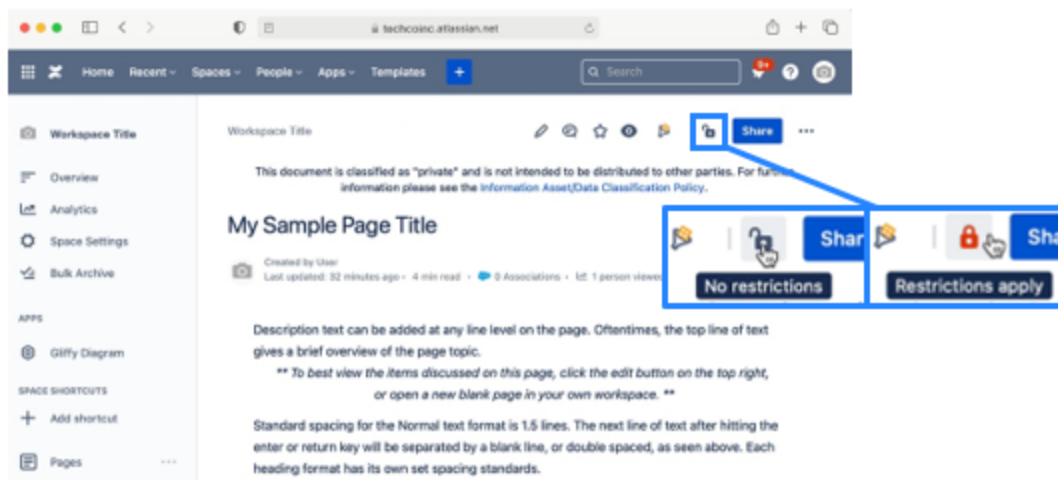
## Chapter 4: Privacy & Security

*At TechCo, Inc. we handle private data for all of our customers, so whether you're working on an internal project or an external project, being aware of your security and privacy settings can make a big difference.*

Just because everyone using this software under the TechCo, Inc. license belongs to the company, does not mean that just anyone should be able to edit your pages or pages outside their own department. The privacy and security settings on Confluence help to keep your pages clean, correct, and under control.

### Viewing & Editing Capabilities

In the top right corner of both the page viewer and the page editor screens, there is a little padlock. When the page is completely unrestricted, it will show gray and in the unlocked position. When the page has editing restrictions but no viewing restrictions, it will show red and in the unlocked position. When the page has both editing and viewing restrictions, the padlock will show red and in the locked position.



To set, remove or modify restrictions, click on the padlock. This will open a dialog box which first details the current restrictions, if any, are on the page.

If you have editing permissions, but the space is restricted in some way, the restrictions will be displayed below the drop-down menu box.

If you do not have editing permissions, the dialog box will open with an info panel explaining the restrictions on the space.

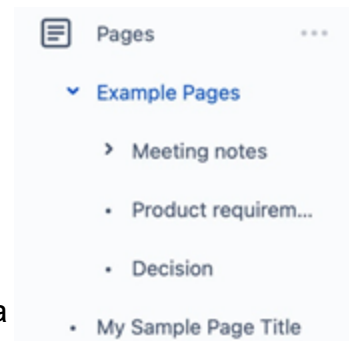
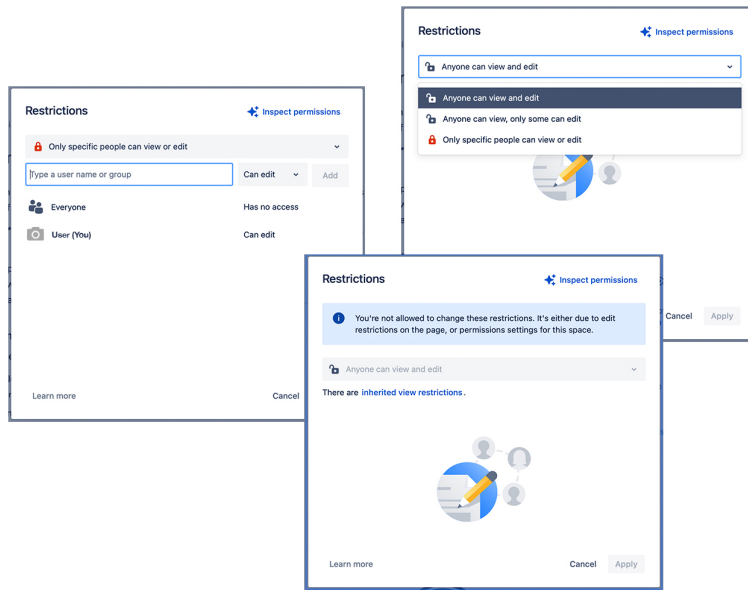
## How the Page Tree Affects It

By default, a new first tier parent page will be set with the same restrictions as the space. Most spaces in Confluence under the TechCo, Inc. license are unrestricted, meaning any employee can edit within that space. This does not mean that every page within that space is unrestricted.

Each page can be set with its own restrictions, but as you go down from parent to child page, the restrictions from the parent page will carry into any child pages. For example: as seen in the page display to the right, "Decision" is a child page to "Example Pages". This means that the restrictions of "Decision" will be determined by those set for "Example Pages". The restrictions can be further tightened for "Decision", but the child page cannot be less restricted than a parent page.

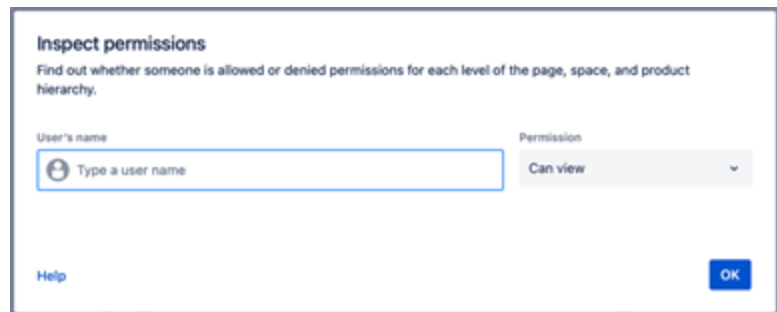
This carries over for all restrictions, setting what is called an access ceiling. The highest level of the chain, be it a parent page, a space or a license, determines the restrictions for all below and within it.

If you are having trouble viewing a page or setting the permissions for a specific group or individual, use the Inspect Permissions button on the restrictions dialog box to determine where in the space or page tree the restrictions differ from those you are trying to set.



## Watch Notifications

As a user in an established company, many of the pages you'll work on were created by other users. By default, the watch setting is activated on any page a user creates. This means that should any changes be made to that page, they will receive an email notification with the date, time and changes made.



**Inspect permissions**  
Find out whether someone is allowed or denied permissions for each level of the page, space, and product hierarchy.

User's name

Permission

[Help](#)

This is a helpful tool for users who collaborate with others to create content and also for users who manage pages that are editable parent pages, so that children pages are editable, but do not want any information altered on those parent pages.

Any user can watch any page, another helpful aspect of this setting. If you are not the creator of a page, but are interested in any updates to the page, activating the watch setting will help you to keep an eye on anything that happens on that page.





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*Disclaimer: Some names were changed to protect company and personal identity. Images may also be altered for anonymity.*

# Appendix A: Macros

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## Activity Stream

Lists recent activity in a single project, or in all projects.

## Advanced Roadmaps for Jira

Embed an Advanced Roadmaps for Jira plan in a page for others to view

## Agile Wallboard Gadget

Displays a board as a Wallboard gadget.

## Aha! roadmaps for Confluence

Embed an Aha! roadmap, report, or presentation in your page.

## Anchor

Create an anchor that allows people to link to a specific point in a page. Names are limited to 255 characters and can't include a % sign.

## Assigned to Me

Displays all unresolved issues assigned to me.

## Attachment Table

Displays a table of attachments based on selection criteria. Columns can be links, images or other metadata.

## Attachments

Creates a list of attachments belonging to this page.

## Average Age Chart

Displays the average number of days issues have been unresolved.

## Average Number of Times in Status

Displays the average number of times issues have been in a status.

## Average Time in Status

Displays the average number of days issues have spent in status.

## Blog Posts

Displays the most recent blog posts in this space.

## Change History

Shows the history of version comments for the current page or blog posts.

## Chart

Displays a chart

## Chart from Table

Visualizes table data with the help of dynamic charts and graphs.

## Children Display

Lists a page's children and their descendant pages.

## Confluence Page Gadget

This gadget renders a Confluence Page.

## Confluence QuickNav

This gadget allows you to embed the Confluence QuickNav into other applications.

## Content by Label

List pages and posts with the labels you enter.

## Content Report Table

Provides a content report in table format, based on labels.

## Contributors

Displays a list of contributors to a page, its hierarchy or selected spaces, or watches of these pages.

## Contributors Summary

Displays a summary in table form of pages and contributors.

**CQL Query**

Displays results of a CQL query.

**Create from Template**

Embed a button in your content which enables users to create content from any pre-defined template.

**Created vs. Resolved Chart**

Displays created issues vs. resolved issues for a project or saved filter.

**CSV (Comma Separated Values)**

Displays CSV (comma separated values) and other delimited data as enhanced Confluence tables.

**Days Remaining in Sprint Gadget**

Displays days remaining in a sprint (Wallboard capable).

**Decision Report**

Create a report of pages and the decisions they contain.

**Excerpt**

Marks part of the page's content for use by other macros.

**Excerpt Includes**

Displays the excerpted contents from another page within the same space.

**Filter Results**

Shows the issues/results for a saved filter.

**Gallery**

Creates a thumbnail gallery from a page's attachments.

**Gliffy Diagram**

Inserts a new Gliffy diagram.

**Heat Map**

Displays the matching issues for a project or filter as a heat map.

**Iframe**

Add an iFrame to your page.

**Include Page**

Includes the contents of a page within another.

**Jira**

Embed JIRA issues or filters into your status reports, release notes, requirements or specifications.

**JIRA Charts**

Display JIRA information on your page as a chart.

**Jira Issues Calendar**

Jira Issues Calendar.

**Jira Road Map**

Display upcoming versions for specified projects.

**Jira roadmap**

Embed an interactive Jira roadmap into your page.

**JSON Table**

Displays JSON data as enhanced Confluence tables.

**Labels Gadget**

Jira issue labels in a Gadget.

**Labels List**

Lists all labels of a space, grouped alphabetically.

**Livesearch**

Embeds a search box into your Confluence page to show search results as you type.

**Lucidchart Diagrams**

Insert a Lucidchart diagram.

**Office Excel**

Inserts Microsoft Excel content into the page.

**Office Powerpoint**

Inserts an interactive Microsoft Powerpoint presentation into the page.

**Office Word**

Inserts Microsoft Word content into the page.

**Opsgenie Incident Timeline**

Shows Opsgenie Incident Timeline.

**Page Index**

Creates an index of all pages within the space.

**Page Properties**

Enter a table of summary information in this macro and display it on another page using a Page Properties Report macro.

**Page Properties Report**

Display a table of pages that contain the Page Properties macro and a specific label. The table includes a link to each page and the summary information contained in the Page Properties macro(s) on that page.

**Page Tree**

Renders a page tree.

**Page Tree Search**

Provides a search box that searches a hierarchy of pages (Page Tree) from a specified root page.

**PDF**

Inserts a PDF document into the page as an interactive presentation.

**Pie Chart**

Displays the matching issues for a project or filter as a pie chart.

**Pivot Table**

Aggregates and summarizes data in pivot tables.

**Popular Labels**

Generates a list or 'heatmap' of the most popular labels.

**Profile Picture**

Displays a user's profile picture.

**Projects**

List multiple projects

**Questions List**

Embed a list of questions on your page.

**Quick Links**

Displays links for common tasks.

**Recently Created Chart**

Displays recently created issues for a specified project as a bar chart.

**Recently Updated**

Lists the most recently changed content within Confluence.

**Recently Updated Dashboard**

Displays recent updates with filtering options. Used on the dashboard.

**Related Labels**

Lists labels used on other pages that have labels in common with the current page.

**Resolution Time**

Displays a bar graph of elapsed time to resolve issues for a project or filter.

**Roadmap Planner**

Create a simple, visual roadmap for planning projects, software releases and more.

**Salesforce Object**

Displays a single Salesforce object.

**Salesforce Table**

Displays a list of Salesforce objects in a table, specifically by a query or search filter.

**Shared Links Bookmarklet Button**

Share a link from anywhere by dragging this button to your browser.

**Spaces List**

Displays a list of the spaces on this wiki.

**Sprint Burndown Gadget**

Sprint burndown chart to track remaining work (Wallboard capable)

### **Sprint Health Gadget**

Visual snapshot of the health of a sprint (Wallboard capable)

### **Starred Filters**

Lists the current user's starred filters.

### **Table Excerpt**

Allows you to mirror table data and use it in different places of the same page for building multiple pivot tables and charts.

### **Table Excerpt Include**

Allows you to use the mirrored copy of table for building multiple pivot tables and generating several charts on the basis of the same table data.

### **Table Filter**

Filters any kind of table data.

### **Table from CSV**

Outputs a table from CSV or TSV data source

### **Table of Content Zone**

Creates a Table of Contents for headings within the body of the macro

### **Table of Contents**

Creates a Table of Contents for the current page based on headings in the page.

### **Table Plus**

Displays Confluence tables with enhanced styling, sorting, row numbering, and column total capabilities.

### **Table Toolbox**

Allows to use Table Filter, Pivot Table, Chart from Table and Table Transformer together with one source table in new editor.

### **Table Transformer**

Merges and transforms tables with the help of SQL.

### **Task Report**

Create a report of tasks from specific locations, people, status and more.

### **Team Calendars**

Embeds any number of Events, People or JIRA calendars into Confluence content.

### **Time Since Chart**

Displays the time since a chosen field for each issue for a project or saved filter.

### **Time to First Response**

Displays the number of hours taken to respond to issues for a project or filter.

### **Two Dimensional Filter Statistics**

Display statistics of issues returned from specified filter.

### **User List**

Displays a list of Confluence users based on group membership.

### **User Profile**

Displays a user's profile details.

### **Version Report**

Track the projected release date for a version. This helps you monitor whether the version will release on time, so you can take action if work is falling behind.

### **Voted Issues**

Shows the issues voted by the current user.

### **Wallboard Spacer Gadget**

Allows for custom spacing between gadgets in a wallboard

### **Watched Issues**

Shows the issues watched by the current user.

### **Widget Connector**

Embed YouTube videos, Flickr slideshows, Twitter streams, Google Docs and other content from the web.

### **Workload Pie Chart**

Displays the matching issues for a project or filter as a pie chart.

# Glossary

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## A

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### **access ceiling**

an upper limit on access to a particular page, space or site based on the restrictions to the highest container level

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## C

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### **collaborative software**

application software that enables the sharing, processing and management of files, documents and other data types among several users and/or systems simultaneously

### **Covid-19**

a disease caused by SARS-CoV-2 that can trigger what doctors call a respiratory tract infection. It can affect your upper respiratory tract (sinuses, nose, and throat) or lower respiratory tract (windpipe and lungs). It spreads the same way other coronaviruses do, mainly through person-to-person contact

### **cross-platform functionality**

computer software that is designed to work in several computing platforms, such as MacOS and Windows

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## E

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### **emoji**

pictograms, logograms, ideograms and smileys used in electronic messages and web pages

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## I

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### **IPO**

an initial public offering or stock launch is a public offering in which shares of a company are sold to institutional investors and usually also retail investors

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## M

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### **macro**

a single instruction that expands automatically into a set of instructions to perform a particular task.

### **market share**

the portion of a market controlled by a particular company or product.

### **mobile device management**

the administration of mobile devices, such as smartphones, tablet computers and laptops



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## P

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### **pandemic**

an outbreak of a disease that occurs over a wide geographic area (such as multiple countries or continents) and typically affects a significant proportion of the population

## R

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### **real-time collaborative editing**

type of collaborative software enabling real-time collaborative editing, simultaneous editing, or live editing of the same digital document at the same time by different users on separate devices, with automatic and nearly instantaneous merging of their edits

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