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PMO Confluence Training Guide (Admin)

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Section 1: Logging in

- Log into PMO Confluence via SSO <u>https://sso.webcentral.navymwr.org</u>. Go to the Management tab and launch the PMO Confluence application. *Recommended Browsers are Edge and Chrome.*
- 2. On the blue navigation bar click on Spaces -> Space Directory.

≡	CNIC N9	Spaces 👻	People	Create	•••	
DISCO	OVER	RECENT SPAC	ES		+1.4	worked on
Ø	All updates	×			uy	worked on
<u>~</u>	Popular	×				
MYW	ORK	×			OJECT	r
	Recently worked o	×				
0	Recently visited	×			nonth	адо
ជ	Saved for later	Space direct Create space			TEST	
: On	nce you do th	is once i	it will sh	оw ир	unc	der your Recent S
	-	the nex	rt time y	ou log	in.	

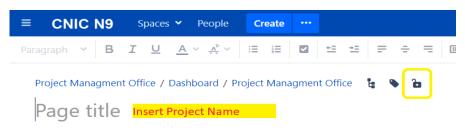
3. Click on the project hyperlink you wish to open.

The two PMO spaces are: Project Management Office and PMO Archived Projects.



Section 2: Create New Projects (Pages)

- 1. Once you are in the PMO space hit the Create button at the top of the blue navigation bar.
- 2. This new page will be the main parent page for the Project, so name accordingly. Before you hit Save set the restrictions by clicking the lock icon.



3. Change the Restrictions to "Viewing and Editing Restricted". Type "PMO" and click on the user group when it shows up in the dropdown and hit the Add button. Click the Apply button to set the restrictions. If you know all the user groups, you can add them at this time.

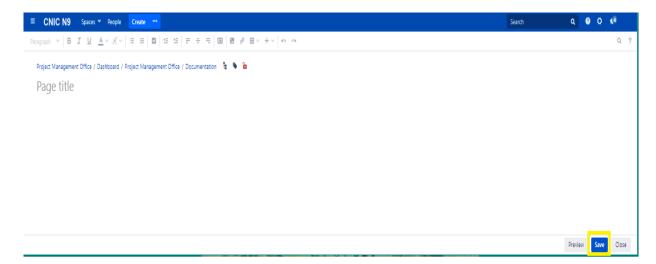
Note: You need to do this when you create new Project pages otherwise you are giving access to everyone associated in the PMO space (Ex. All contractors). Therefore, it is very important to at minimum restrict to the PMO user group at the time of creation. After the new user groups are setup or defined you can go back and update the main page restrictions later.

Restrictions		Help
 Viewing and editing restricted Only some people can view or edit this page. There are inherited view restrictions. 		Î
Type a user name or group Insert "PMO"	Can view and er 🔻	Add
Q Everyone	Has no access	
Allison Lambert	Can view and edit	
Ф РМО	Can view and e	Remove
		•
	Apply	Cancel



Section 2: Create New Projects (Pages)

4. Click the Save button when you are finished editing the page.



5. To create subfolders under the new Project Page, click on the Project hyperlink on the Page Tree on the left side menu to have the page load on the right side of the screen. Click the Create button at the top of the page.

Note: Note: If you want a subpage under a particular page by displaying this page before hitting Create ensures the new page is ordered underneath.

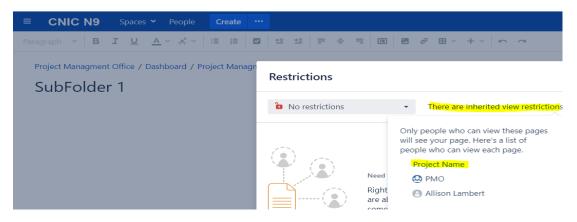
■ CNIC N9 Spaces ~	People	Create
Project Managment Office	ŝ	Dashboard / Project Managment Office 🔒
	2	Project Name
PAGE TREE		Created by Allison Lambert 5 minutes ago
> EC Project		Like Be the first to like this
Retirement Project		Like Be the first to like this
File Lists		Write a comment
Project Name		

PMO Confluence Training Guide (Admin)



Section 2: Create New Projects (Pages)

6. If you want certain people to edit this page (Ex. To add documents). Then you will need to set the restriction on this subpage. Only the viewing access is carried down through subpages. Therefore, click the lock icon.



7. Change the restrictions to "Editing restricted". The viewing restriction is set on the main parent page. Type "PMO" and/or other user groups and click on the user group when it shows up in the dropdown and hit the Add button. Click the Apply button to set the restrictions.

 ■ Editing restricted Only some people can edit this page. 	There are inherited view re	estrictions.
Type a user name or group Insert "PMO"	Can edit	Add
O Everyone	Can view	
Allison Lambert	Can edit	
🕰 РМО	Can edit	Remove

Apply Cancel

8.	Click the Save button on the bottom of the Page.
0.	

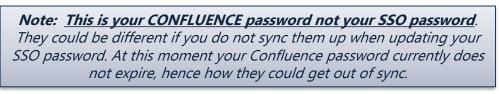


Section 3: Adding/Updating Permissions

 Go to the PMO Space. On the bottom left side of the toolbar click on "Space tools" -> "Permissions".



2. You will be prompted to put in your Confluence password when performing Admin functions to the space. This is the only time you will be prompted to do this. Normal end user functions do not require a second login. Enter in your password and click the Confirm button.



A	If you were sent to this page from a link obtained from an
_	untrusted source please proceed with caution or validate the
	link source before continuing.
	ve requested access to an administrative function in Confluence
	ve requested access to an administrative function in Confluence required to validate your credentials below.
	required to validate your credentials below.
	required to validate your credentials below.
	required to validate your credentials below.
	required to validate your credentials below.



Section 3: Adding/Updating Permissions

3. The Permissions page is where you set what the user groups can do in the project. Click the "Edit Permissions" button under the area you wish to adjust.

Note: This is NOT where page restrictions are set.

Most of the time you will adjust the Groups section, because it is the easiest to maintain. **DO NOT ADJUST ANONYMOUS ACCESS**. This is what makes the website private and not viewable to the public (no logon required).

Note: The user group must exist first in Confluence before this setting can be adjusted. Contact the Administrators to create the group if it does not already exist.

Space Tools

erview Permissions Content Tools Look and Feel Integrations														
maning and and and														
missions Restricted Pages														
Licensed Users														
Groups														
Grant permissions for this space to all the members of a group.														
	All		Page	s	Blog		Attac	hments	Comme	ents	Restrictions	Mail	Space	
	View	Delete	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Adm
		Own												
PMO	0	0	0	0	0	0	0	0	0	0	0	0	0	0
confluence-administrators	0	0	0	0	0	0	٥	0	0	0	٥	0	0	0
Edit Permissions														
Individual Users														
Grant permissions to individual users, regardless of which groups they are a member of.														
	All		Page	s	Blog		Attac	hments	Comme	ents	Restrictions	Mail	Space	
	View	Delete	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admi
		Own												
Allison Lambert (alambert)	0	0	0	0	0	0	0	0	0	0	٢	0	0	0
Edit Permissions														
Anonymous Access														
If your Confluence site is public, you can grant permissions to people who are not logged in. Anonymous users can be granted almost any permission, but we recommend you limit this to viewing and commenting.														
	All		Page	5	Blog		Attac	hments	Comme	ents	Restrictions	Mail	Space	
	View	Delete	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Adm [:]
		Own												

0 0 0 0 0 0 0 0 0 0

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Section 3: Adding/Updating Permissions

4. Click the boxes on the user group's row you wish to update. To add a user group use the search bar and then click the Add button.

Note: No one outside of PMO and N946B and Confluence Admin should have Restrictions and Space Admin access checked. Also limit who has Page Delete access as well.

Groups															
Grant permissions for this space to all the members of a group.															
	(All		Pages		Blog		Attac	hments	Comn	nents	Restrictions	Mail	Space	
		View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
N946	Select All	1						1	1					V	
PMO	Deselect All	1	1		1	V	•		1		•	V	1	1	V
confluence-administrators	Deselect All	1	1		1	V	∢	1	1		∢		V	V	V
epiuse	Select All	1							1		◄			V	
epiusepm	Select All	ø		Ø				1	 Image: A second s	1	∢			V	
n941	Select All	ø						ø	ø	1	◄			Ø	
n946b	Deselect All	ø	1	ø	1	V	V	ø	ø	1	1		¥	Ø	V
n948	Select All	1					1	ø	1					Ø	
Insert User Group]														

5. Once the Permissions are set, click the Save All button.

		Blog	Attachments	Comments	Restrictions	Mail	Space	
View Delete Own	Add Delete	Add Delete	Add Delete	Add Delete	Add/Delete	Delete	Export	Admin
Anonymous Select All								

Save all Cancel

Note: Once a User Group is added to the Space Permissions you still need to go update the Project main parent pages restrictions (lock icon) they need access to in the PMO space if you have not already done so.



Section 4: Archive a Project

1. Go to the PMO Space, click on the Project main parent page hyperlink on the Page Tree on the left side menu to have the page load on the right side of the screen. Click on the three-dot line button -> Move.

	· Create ···	Search	Q Ø Ø 🕫 🤮
Project Managment Office 🖞	Dashboard / Project Managment Office 🍵	✓ Edit 🗘 Save for later	© <u>W</u> atching ≮ <u>S</u> hare
Rroject Managment Office ☆	Project Name		A <u>t</u> tachments (0)
PAGE TREE	Created by Allison Lambert about an hour ago		Page History
EC Project	Lite Bethe first to like this		Restrictions
Retirement Project			Page Information
File Lists	🚷 Write a comment		Resolved comments (0)
* Project Name			View in Hierarchy
 SubFolder 1 			View Source
			View Storage Format Export to PDF
			Export to Word
			Import Word Document
			Сору
			Move
			Delete

2. In the New Space and New parent page field replace the "Project Management Office" with "PMO Archived Projects"

Move Page – 'Project	Name'	Help
Advanced Search Recently Viewed Browse	Specify the new parent page for this page and its children by space and title. New space: Project Managment Office New parent page: Project Managment Office Start typing a page title to see a list of suggestions.	
	Current location: Project Managment Office ? Project Managment Office New location: Project Managment Office ? Project Managment Office	
	Reorder Move	Cancel

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Section 4: Archive a Project

3. The New location will update. Click the Move button.

Move Page – 'Proj	ect Name'	Help
Advanced	Specify the new paren	t page for this page and its children by space and title.
Search		
Recently Viewed	New space:	PMO Archived Projects
Browse	New parent page:	PMO Archived Projects
		Start typing a page title to see a list of suggestions.
	Current location: P	roject Managment Office > Project Managment Office
	New location: P	MO Archived Projects > PMO Archived Projects
		Reorde Move Cancel

4. The page will reload redirecting to the PMO Archived Projects space where the moved Project folder is now visible on the Page tree menu.

Note: You will see the page restrictions move as well, but this Space is only restricted to Confluence Admins and PMO user group, so even though other groups might have access to the page, it does not mean they can see it. They can only see the Project folder again if the Space Permissions allow it.

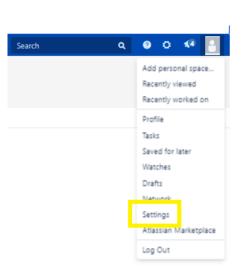
	≡	CNIC N9	Spaces 🗸	People	Crea	te ••	•										
	×	PMO Archive	ed Projects	습			^{рмо а}		-	cts (â						
	PAGE T	REE			Created	by Allisc	n Lambe	rt abou	t an hou	r ago							
		Test - Archive Pro ject Name	oject		🔥 Like	Be ti	ne first to	like this									
	• S	ubFolder 1		G	Write a comment												
Space Tools Overview Permissions Content Tools Look and	Feel Integ	grations															
Permissions Restricted Pages																	
Licensed Users																	
Groups Grant permissions for this space to all the member	s of a group.																
				AI	11	Page	s	Blog		Attach	ments	Comn	nents	Restrictions	Mail	Space	
				Vi	iew Delet Own	e Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
					0 0	Ø	Ø	Ø	Ø	Ø	Ø	Ø	Ø	0	0	Ø	Ø
PMO																	

Section 5: Change Password

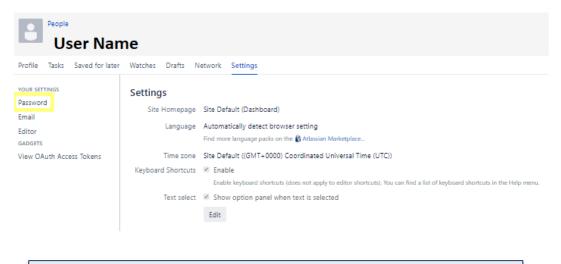
1. To change your password go in the top right of the blue navigation bar and click on the person icon or your profile picture if it has been changed.



2. Click on "Settings".



3. Under "Your Settings" click on "Password". And this is where you can update it.



Note: If you do not remember your Current Password please contact the Confluence Administrators so they can reset your Current Password.