PREPARED BY:	**LAST UPDATED:**
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PMO Confluence Training Guide (Admin)

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PMO Confluence Training Guide (Admin)

Section 1: Logging in

1. Log into PMO Confluence via SSO https://sso.webcentral.navymwr.org. 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.
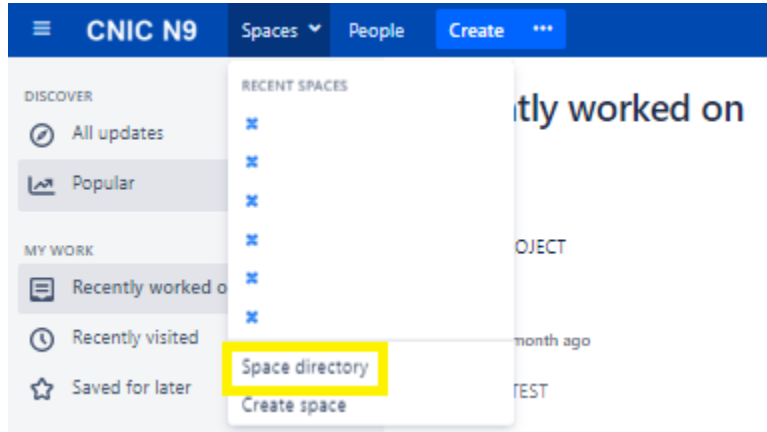
> **Note:** *Once you do this once it will show up under your Recent Spaces the next time you log in.*

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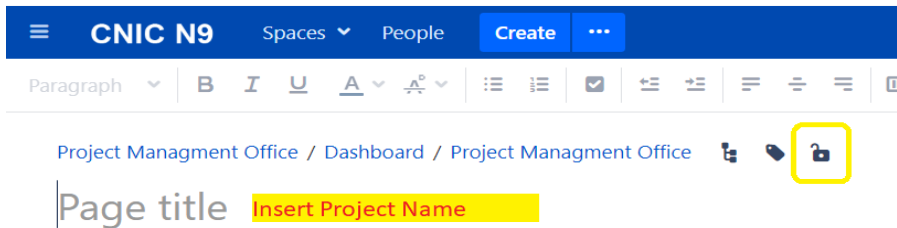
3. Change the Restrictions to "Viewing and Editing Restricted". Type "PMO" and click on the user group when it shows up in the dropdown and hit the Add button. Click the Apply button to set the restrictions. If you know all the user groups, you can add them at this time.

> **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.*
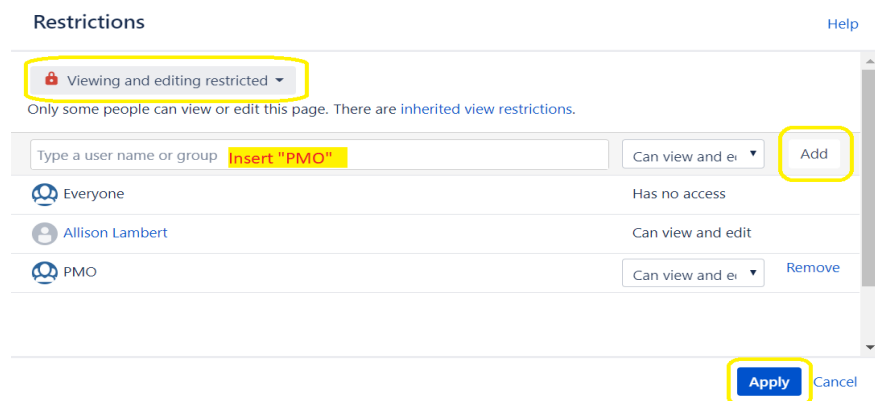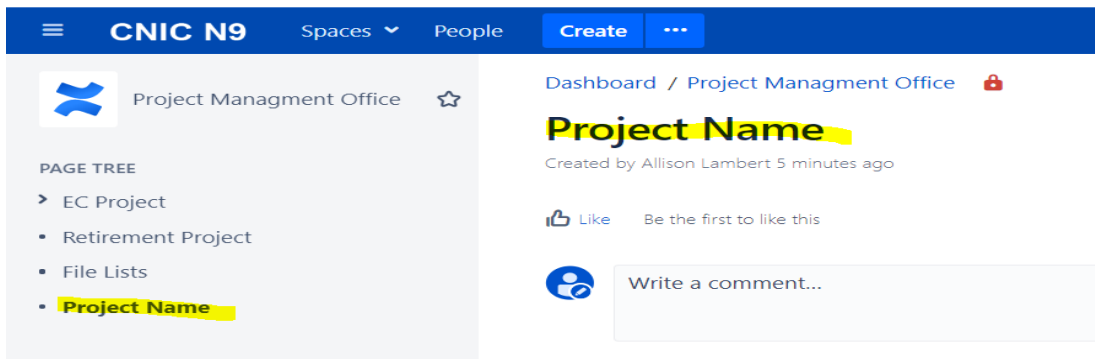
Section 2: Create New Projects (Pages)

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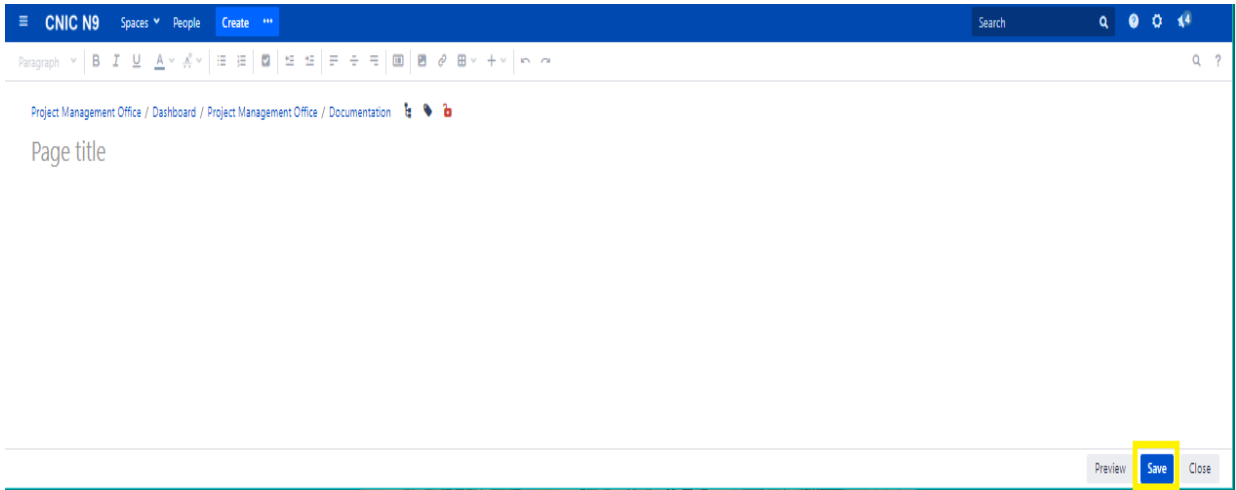
5. To create subfolders under the new Project Page, click on the Project hyperlink on the Page Tree on the left side menu to have the page load on the right side of the screen. Click the Create button at the top of the page.

> **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.

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.
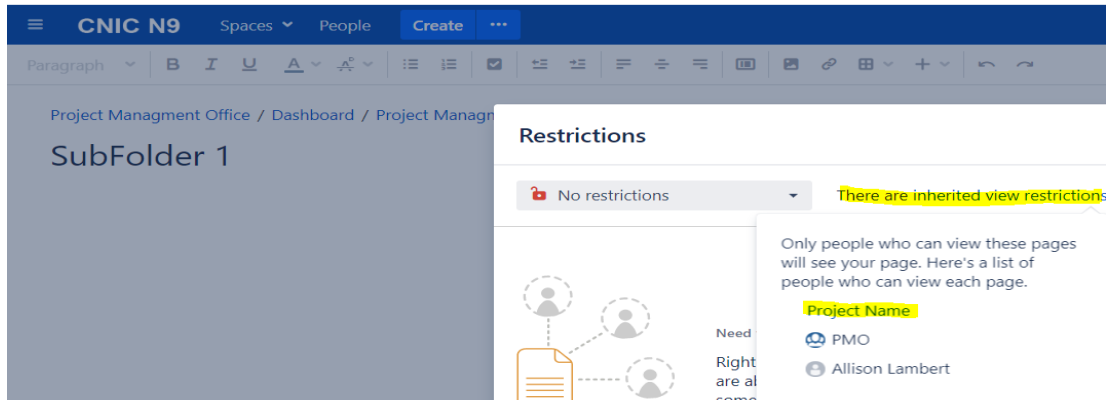

7. Change the restrictions to "Editing restricted". The viewing restriction is set on the main parent page. Type "PMO" and/or other user groups and click on the user group when it shows up in the dropdown and hit the Add button. Click the Apply button to set the restrictions.
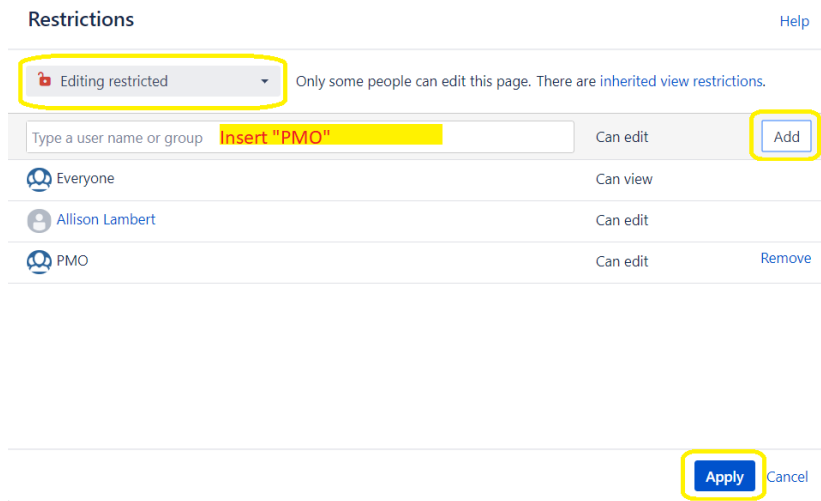
8. Click the Save button on the bottom of the Page.

Section 3: Adding/Updating Permissions

1. Go to the PMO Space. On the bottom left side of the toolbar click on "Space tools" -> "Permissions".
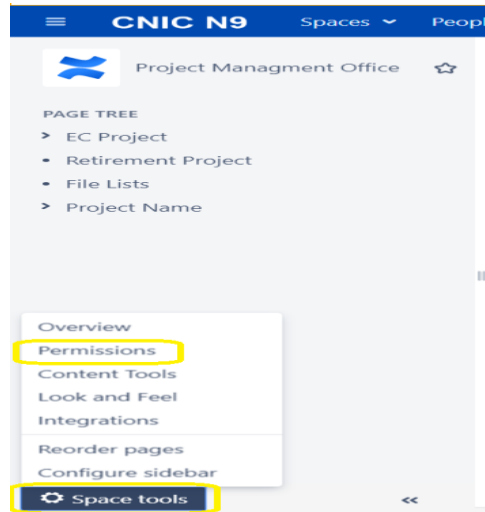
2. You will be prompted to put in your Confluence password when performing Admin functions to the space. This is the only time you will be prompted to do this. Normal end user functions do not require a second login. Enter in your password and click the Confirm button.

> **Note: This is your CONFLUENCE password not your SSO password.** *They could be different if you do not sync them up when updating your SSO password. At this moment your Confluence password currently does not expire, hence how they could get out of sync.*
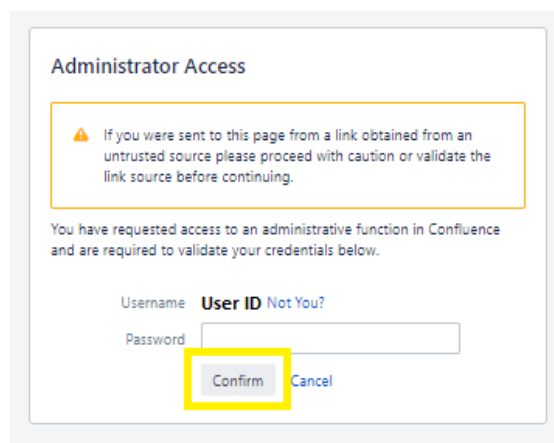
Section 3: Adding/Updating Permissions

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

Overview Permissions Content Tools Look and Feel Integrations

Permissions Restricted Pages

Licensed Users

Groups
Grant permissions for this space to all the members of a group.

	All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
	View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
PMO	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
confluence-administrators	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Edit Permissions

Individual Users
Grant permissions to individual users, regardless of which groups they are a member of.

	All		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
	View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
Allison Lambert (alambert)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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		Pages		Blog		Attachments		Comments		Restrictions	Mail	Space	
	View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
Anonymous	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗

Edit Permissions

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		Attachments		Comments		Restrictions	Mail	Space	
		View	Delete Own	Add	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
N946	Select All	☑	☐	☐	☐	☐	☐	☑	☑	☑	☑	☐	☐	☑	☐
PMO	Deselect All	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
confluence-administrators	Deselect All	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
epiuse	Select All	☑	☐	☐	☐	☐	☐	☑	☑	☑	☑	☐	☐	☑	☐
epiusepm	Select All	☑	☐	☑	☐	☐	☐	☑	☑	☑	☑	☐	☐	☑	☐
n941	Select All	☑	☐	☐	☐	☐	☐	☑	☑	☑	☑	☐	☐	☑	☐
n946b	Deselect All	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
n948	Select All	☑	☐	☐	☐	☐	☑	☑	☑	☑	☑	☐	☐	☑	☐

Insert User Group 🔍 Add

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

		All		Pages		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.
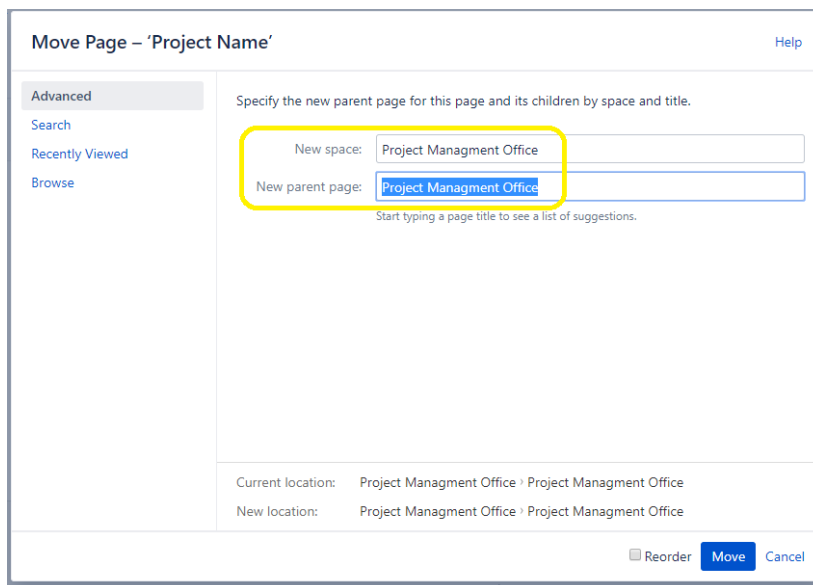
Section 4: Archive a Project

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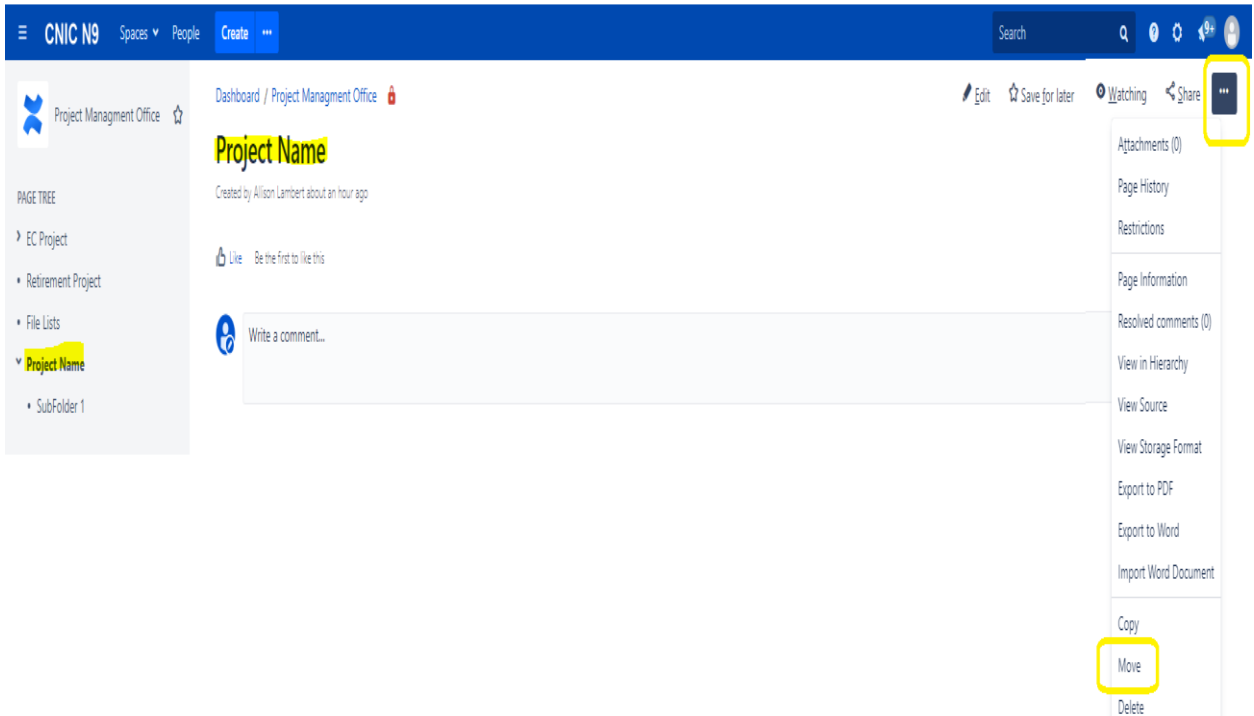
2. In the New Space and New parent page field replace the "Project Management Office" with "PMO Archived Projects"

Section 4: Archive a Project

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

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.
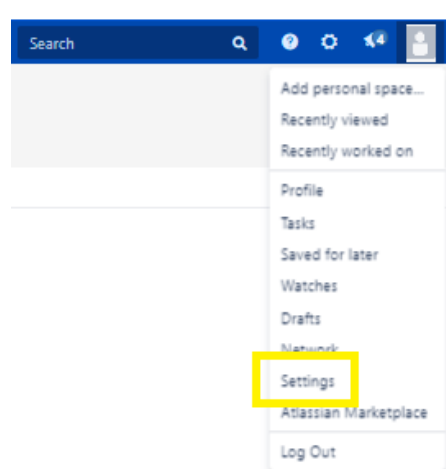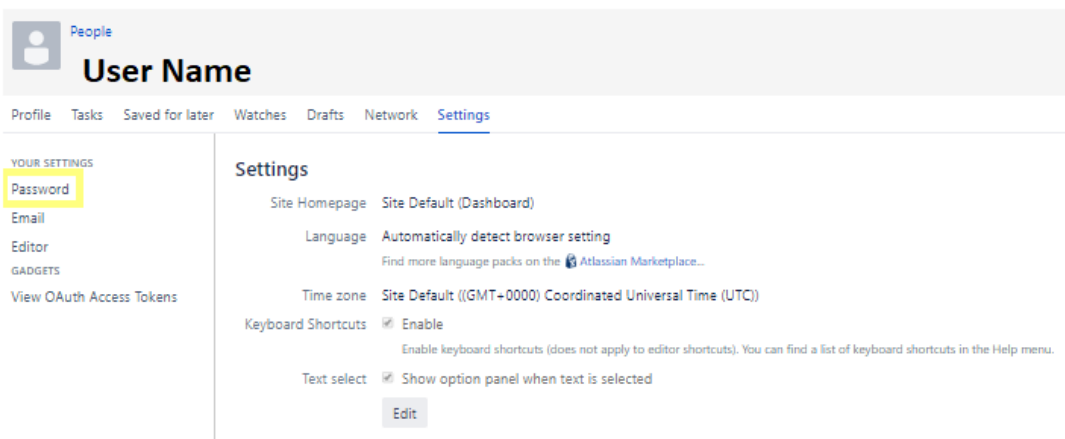
Section 5: Change Password

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.