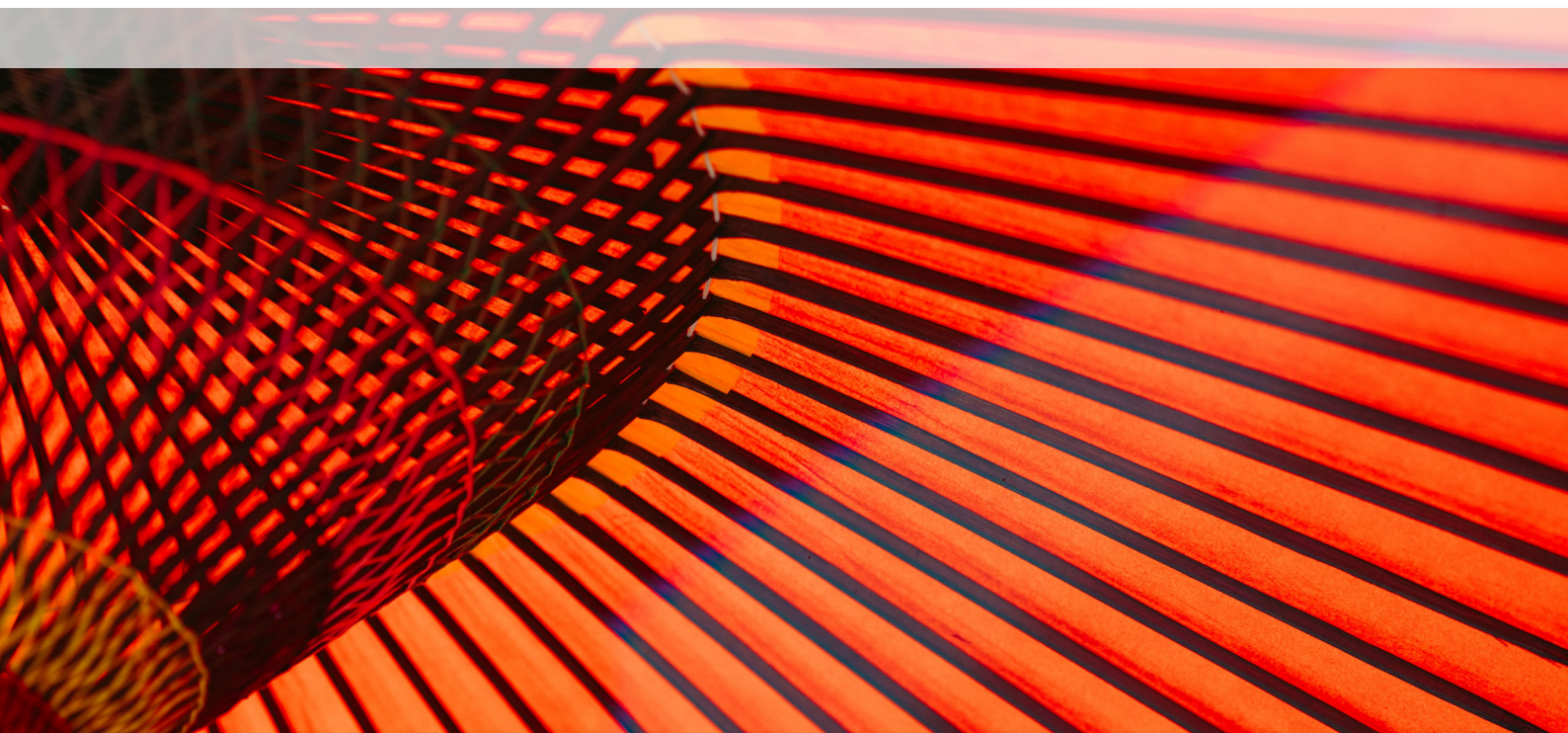**Team Files** + **Confluence** + **Jira**

Implementing a single source of truth
for your documents with

Confluence/Jira
and Team Files

Authors

Nelson Pereira
Co-founder of ikuTeam

Nelson is a productivity geek, always looking for ways to improve his efficiency to achieve a great work/life balance. He has over ten years of experience in software development, team management and building new products. When not hanging around with friends in the beautiful city of Porto, he is traveling around the world.

Miguel Jesus
Co-founder of ikuTeam

Miguel is a design nerd and the lead designer of Team Files.
With over ten years of experience in Design, he's been focusing in UX for the last years to make great apps easy to use.
He loves to travel and meet new cultures, but also to return home in Porto, to play videogames and cook for friends.

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Introduction

Do you use Confluence and Jira to collaborate and share files and documents with your team? Do you upload, download, edit, and upload again and again to change a file? Do you also have those same files stored on SharePoint (or Google Drive, OneDrive or Dropbox, etc.)? Do you struggle to keep track of the latest version of a file? Is it the one on Confluence? On SharePoint? Or is it the one attached to yet another email thread? Does all this sound familiar? Keep reading; this white paper is for you.

When computers took over the workspace a few decades ago, floppy disks with files and documents started to go around to allow collaboration, albeit one at a time. Then the email came along, and for years we've been using it to send files all over to collaborate with colleagues, creating endless versions along the way. Over the last years, we started using cloud storage, with file sync capabilities and real-time collaboration, to make sharing effortless. We thought that this would solve our old problems, but we were wrong. Why wasn't it fixed for good?

The modern digital workplace is more complex, with an ever-growing set of tools and different contexts. To avoid all this, many times, we end up falling back to the email for its immediate simplicity, but at a higher cost down the road.

Consider the following scenario: you have a business report created in Microsoft Excel and saved on a SharePoint document repository. One of your colleagues attaches it to a Confluence page to share the knowledge with the company and to a Jira issue as a reference to complete a new task. Another team then downloads your report from the page, makes valuable updates to the document, and uploads it again to the Confluence page. The problem here is that these changes are not going back automatically to Sharepoint, and now the version in the Jira issue is also outdated. Sending an email around with the updated document would only make things worse, but it's still likely to happen.

The challenge is to integrate the different tools and platforms to have all data synced and updated automatically everywhere. Putting this to work in our scenario, it would mean that the updated report (in Microsoft Excel format) is in SharePoint, Confluence, and Jira without having someone manually checking and updating attachments and the file storage.

This solution is the essence of a single source of truth (SSOT), one reference point where you know you can find the latest version of what you need quickly (it's like the Holy Grail for information systems). This white paper describes how to implement an SSOT that works with what you're already using. You'll start getting the benefits in no time. You'll spend less time finding what you need without worrying about having duplicated data or dealing with the frustration of working on the wrong version, giving you more time and energy to focus on what matters.

SSOT systems provide data that are authentic, relevant, and referable.

"IBM Smarter Planet - Operational risk management for financial services".
Archived from the original on September 2015.

Single Source of Truth (SSOT) and Implementation Concepts

By Wikipedia definition, "in information systems design and theory, single source of truth (SSOT) is the practice of structuring information models and associated data schema such that every data element is mastered (or edited) in only one place."

Although the concept might seem simple, it might not be easy to implement when you work with big and overlapping teams, spread across multiple locations, and using different digital systems for collaboration.

Let's face it: people use many different tools for different purposes, and that's not about to change, as no solution can meet everyone's needs. You may have your business team working in SharePoint and with Excel/Office files, your Content and Marketing teams collaborating around Confluence and Google Drive, and your development and support teams using Jira to plan and to get tasks done. This simple example shows how the digital workspace can get really complex, really fast. It's not unusual to find a company/enterprise using Microsoft Office 365/SharePoint, with Atlassian Confluence and Jira, alongside Google Drive/Docs and even Box cloud or other tools.

Keeping track of the content across all these platforms is time-consuming, causes duplicated data across several places and generates frustration across teams. At the same time, more and more enterprises can't risk getting outdated, hence incorrect information because of duplicates that get wrongly linked, making the adoption of an SSOT increasingly relevant.

Teams already use Atlassian Confluence and Jira to collaborate and get things done. Still, to edit documents that refer back to the primary "source of truth," we need to bring in the document edit tools and connect the file storage they use. Only then it is possible to keep everything in sync, updates, and edits propagate to the entire system, ensuring cross-team and cross-enterprise frictionless collaboration.

So, you can use Confluence and Jira as the collaboration platform to get your teams connected and working together. Then you can create an SSOT setup using the Team Files app and the infrastructure you already have like SharePoint, Google Drive, or even FTP Servers. The app also includes document editing with Microsoft Office apps or Google Gsuite to allow your team to collaborate in real-time (no file locks), knowing they are working on the right file.
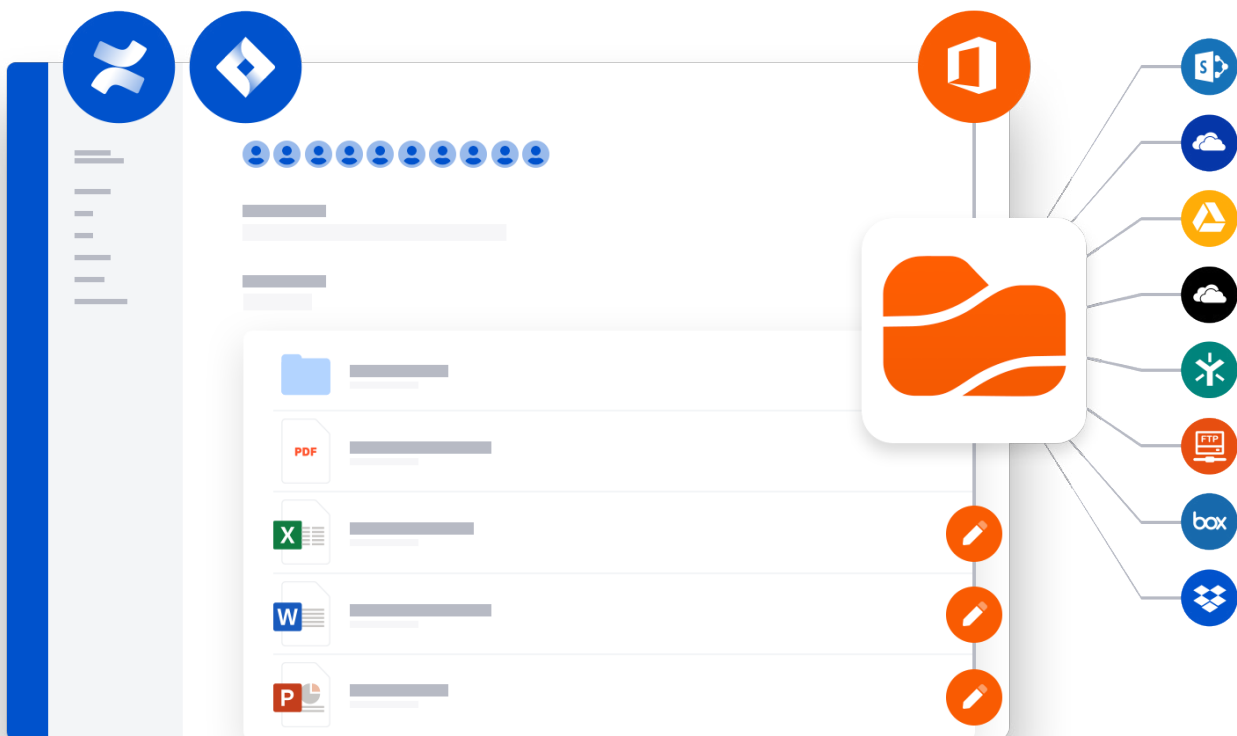
SSOT Benefits for your organization and productivity

Why does a Single Source of Truth matters to your company?
Because not having a good SSOT in place:

- ✖ Slows down workflows;
- ✖ Impairs decision making;
- ✖ Hinders the ability to innovate;
- ✖ Wastes people's time for copying data.

Companies with a robust data and business intelligence infrastructure that runs on an SSOT can:

- ✚ **Eliminate duplicate entries** of data/files;
- ✚ Provide decision-makers with the **right files at the right time;**
- ✚ Substantially **reduce the time spent** to identify the correct file version;
- ✚ **Iteratively improve the files and data intelligence capabilities** of the company;
- ✚ **Increases productivity** because you don't have to switch systems to find what we need;
- ✚ **Reduces the chances of human error** by eliminating the need to copy and paste or manually update information from one system to another;
- ✚ **Improves communication** because everyone in the company is looking at the same content;
- ✚ **Empowers better decision-making** by putting the right information in people's hands.
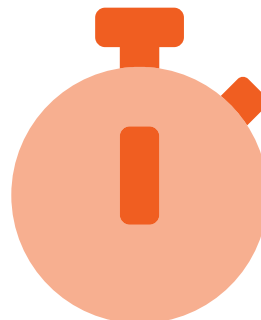
Getting started with an SSOT with Confluence/Jira & Team Files

Build your Single Source of Truth

Keep your team on the same page by attaching relevant files and folders to Confluence pages and Jira issues. Create a single source of truth that is always updated and without bloating your Atlassian instances.

Every team has different needs, so you can connect just one folder or multiple ones to build your single source of truth with the Team Files app. You can use your current file storage infrastructure, it's easy to set up, and it will save you a lot of time and resources.

Getting started with Team Files

Connect your first folder

The first person using the app needs to connect one folder to enable attaching files and folders to your pages and issues.
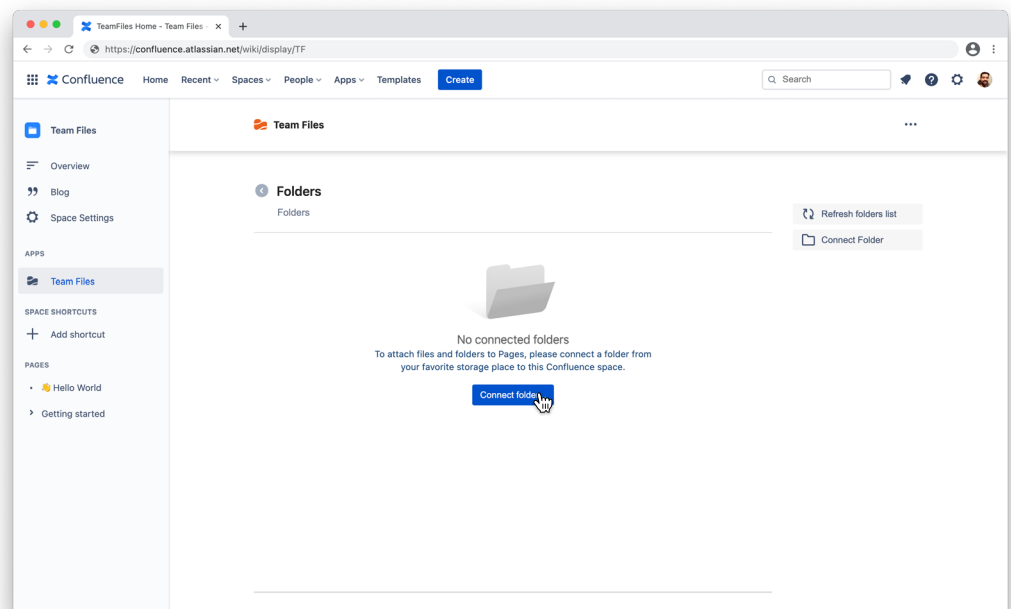

1. Open the app and click the "Connect folder" to get started.

2. Select the storage place where your folder is and authorize Team Files to access it. You can connect folders from all the storage places that you and your team use, including multiple accounts of the same service. The Team Files app supports Box, Dropbox, Egnyte, FTP Servers, Google Drive (includes Team Drives support), OneDrive, OneDrive for Business, and SharePoint storages. Add one or all; it's up to you and your team.

> **Pro tip!**
>
> As an Admin, you can control and authorize which storage services are compliant or not to use in your Jira and Confluence instances.
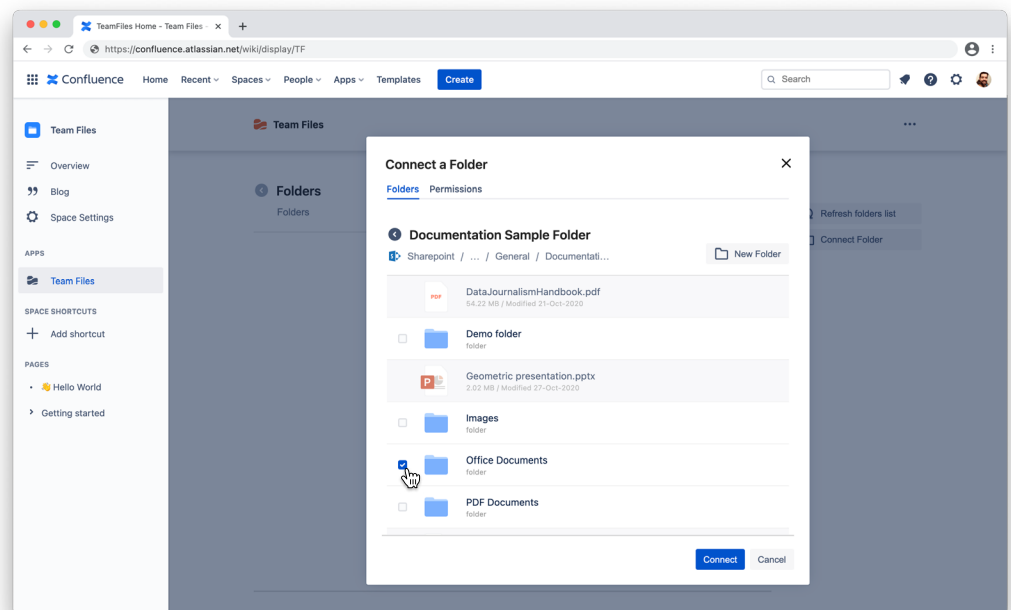

3. Browse the folders until you find the one you want to connect and select it. You can choose more than one.
4. *Optional:* click the "Permissions" tab to set advanced options. By default, any folder you connect will be visible and editable by your team.
5. Click the "Connect" button.

All done. That folder is now a Confluence Space Folder or Jira Project Folder. Everyone in your team can use the same folder or add more (including from different storage places) if they want.

Manage your files

The Team Files app provides a full file manager and browser right inside Confluence and Jira to: navigate the folders, create and edit documents, rename, download, and upload files.
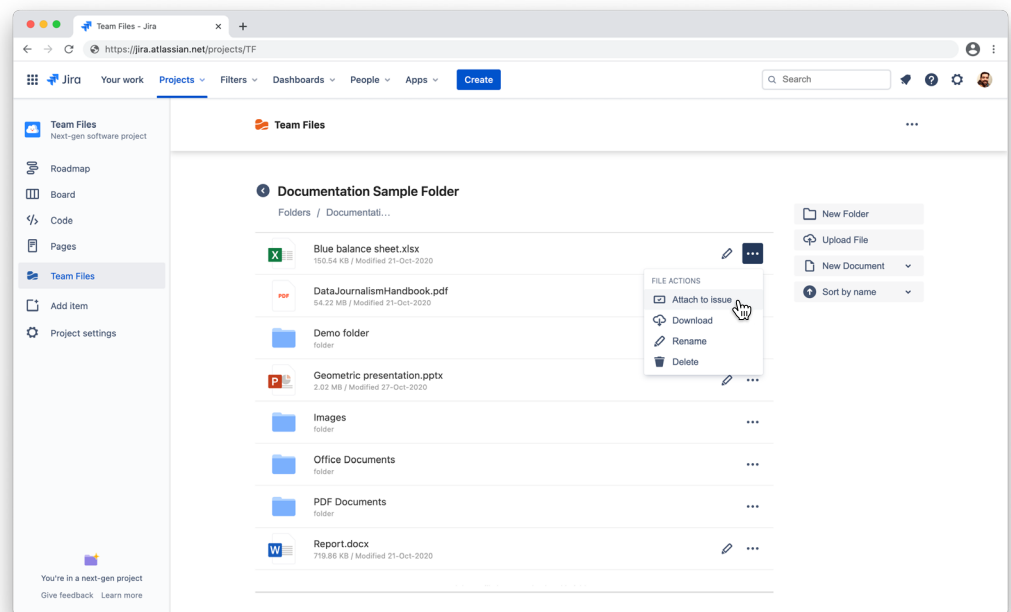

Pro tip!

You can create new Word documents or Excel Spreadsheets, right from Confluence and Jira, to start collaborating in no time.

Pro tip!

In Team Files for Jira, you can also link files to existing issues.

Share files and folders with your team

You can attach any file or entire folders from your preferred storage place (ex. SharePoint, Google Drive, Dropbox, etc.) to your Confluence pages and Jira issues. This way, you and your team can access the relevant content in the right context.
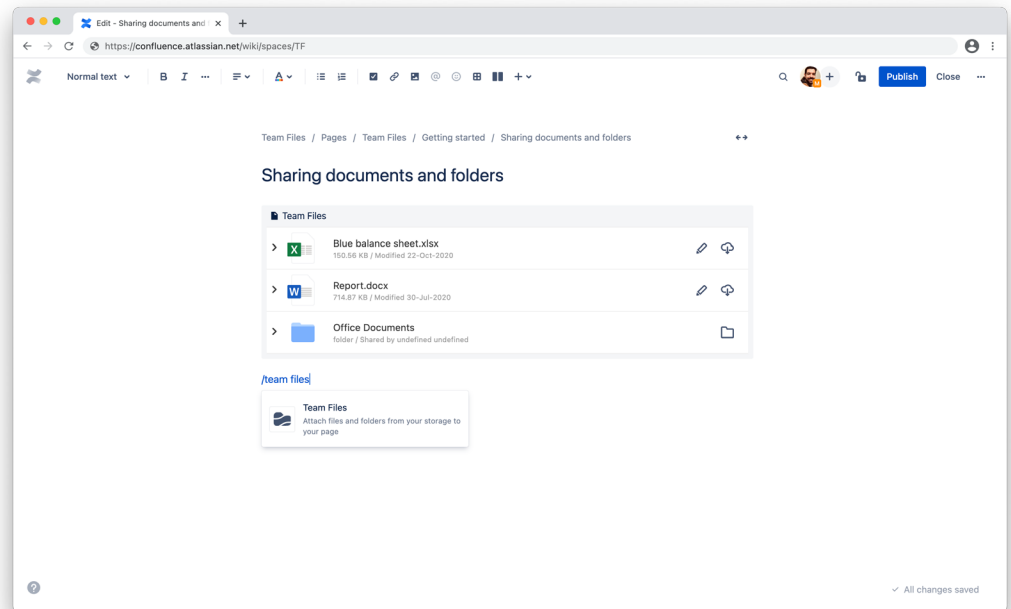
The Team Files Macro for Confluence

In Confluence, you can attach files and folders with our macro.

1. Enter the edit mode of the page where you want to attach content;
2. Click the add macro button in the toolbar and look for the Team Files app;
3. Select the file or folder you want to show on the page from the modal;
4. Click the "Attach" button. Your selection is now visible on the page;
5. Exit the edit mode to preview your attachment. If it's a document, you can edit it, and if it's a folder, you can navigate it. All this without ever leaving Confluence.

Pro tip!

You can also use the / shortcut. Type /team files to add the macro and then click the "Edit" button to select your file or folder.
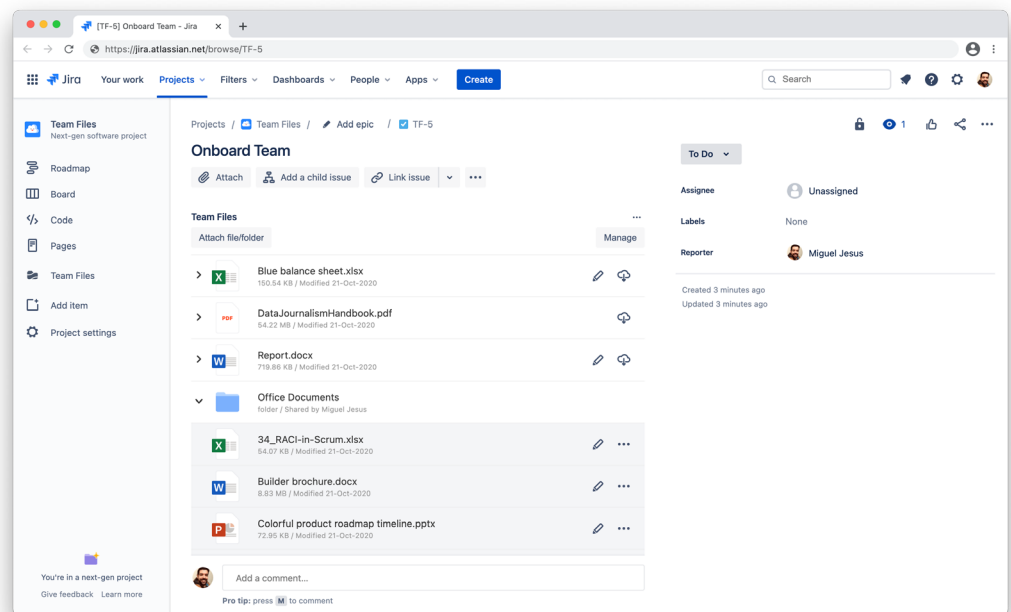
Attach files and folders to a Jira issue

In Jira, you can attach files and folders to issues with our app.

1. On the issue page, click the "Add app" button below the issue title and select Team Files;

2. Select the file or folder you want to add to the issue from the modal;

3. Click the "Attach" button. Your selection is now visible on the issue. If it's a document, you can edit it, and if it's a folder, you can navigate it. All this right from your Jira issue.

Pro tip!

You can drag & drop files to a folder shared on Confluence or Jira.
The app saves the files to the original storage place.

Access Permissions

Data control is important, so when sharing a file or connecting a folder to Confluence/Jira, make sure you select the right read/write permissions. We designed the Team Files app to make content accessible to anyone in a Confluence Space or Jira Project, but you can control which people on your team can see or edit content using groups.

Take-aways

There is a lot to consider when implementing a single source of truth for your files/documents with Confluence/Jira and Team Files and using it daily. But keeping the content up-to-date and getting your teams and files on the same page is critical for successful collaboration workflows and assertive decision making. Just remember these points to set it up and keep it going:

- **Decide teams and group permissions** – Remember, you can enable content access on Confluence/Jira even if a group of people does not have access to the original file repositories, providing full cross-team collaboration. But you can also manage who can view and edit attachments. Information access is essential, so keep that in mind when setting up a Jira Project or Confluence Space with Team Files.

- **Bring different teams/departments together on Confluence/Jira** – Team Files enables the connection of multiple folders from different storages like SharePoint, OneDrive, Google Drive, Dropbox, FTP Servers, and more.

- **It's a single source of truth** – The team must know that all the changes they make to files/documents attached on Confluence/Jira save to the original storage. Likewise, any change to the original file/document in their storage will update on Confluence/Jira

- **Communicate** – Having an SSOT setup affects everyone, so share the concepts with the teams.

Above all else, remember that every team is different, so be agile, start with a small project or space, iterate, fix what does not work, evolve and create the workflow that matches your team, and experience the benefits of having everyone on the same page.

Team Files
www.teamfiles.app

ikuTeam
www.ikuteam.com