

## Atlassian Confluence as an Organizational Knowledge Base

### Scenario

MediCenter has been an industry leader in providing administrative web-based software solutions to teaching hospitals globally for the past 16 years. Currently serving over 70 accredited teaching hospitals comprised of over 70,000 medical residents and 100,000 teaching faculty (attending physicians), MediCenter is a small company with 25 employees that service a surprisingly large portion of the market.

PortCo, MediCenter's parent company, is a large portfolio company that had taken small companies like MediCenter and turned them into multi-million dollar organizations. One of PortCo's companies, ValuMed, was in the same industry as MediCenter, so PortCo decided that as an alternative to hiring outside resources for the ever-growing MediCenter, they would transfer resources from ValuMed. Instantly, MediCenter's customer service staff doubled almost overnight.

The new MediCenter customer service employees all worked remotely (away from the home office), but needed some way to be able to recall information about the software and internal processes and communicate with the more senior employees in the home office. Since the software development team uses several tools within the Atlassian suite (Jira, et. al.), the training director decided to give Atlassian Confluence a try as an internal knowledge base.

Since MediCenter was previously a small company, not much information had been previously documented. The documentation team began documenting the common customer support-related tasks and placing them in Confluence. Next, the training team worked with subject matter experts (SMEs) and began documenting the MediCenter software in modules within Confluence. Each Confluence article followed the same format and contained at least three relevant keywords to ease searching.

After each new software release, relevant articles are updated. Since Confluence also maintains a change history, allows comments and allows upvoting on each page, there are many opportunities for communication and collaboration within a single tool.

Since being implemented, Confluence has become the go-to repository for remote MediCenter customer service team members and new hires. In drafting responses to client requests, team members are required to first check the Confluence knowledge base if they need assistance. The team has reported that Confluence has eased the burden of learning an otherwise intimidating software system.

### 1

#### What is it?

A *wiki*, derived from the word meaning "quick" in the Hawaiian language, is web site that contains information about a subject and is editable by a community of users. Confluence is a web-based wiki and organizational tool within the Atlassian suite. It allows users and administrators to create a customized knowledge structure that best fits their organization. Since Confluence is within the Atlassian suite of tools, one of its main strengths is its collaboration capabilities with other Atlassian tools such as Jira and ServiceDesk.

Perhaps one of the most valuable functions of Confluence for organizations is the ability to communicate among team members by leaving comments on articles and upvoting articles. For MediCenter, one of the alternatives was Google Docs. Google Docs has documentation and collaboration capabilities and integrates with other tools in the "G-Suite" of products. However, the Atlassian suite of tools proved to be more complete; including tools for logging support tickets, task organization and chat.

### 2

#### How is it used?

Knowledge base and wiki tools can be used internally or as client-facing resources. Its use can depend on the audience for the content. Internal tools are usually placed on the organization's Intranet and made available only to those within the organization because it can contain sensitive or proprietary organizational knowledge and processes. Within Confluence specifically, there are *spaces*. These spaces can contain individual articles related to a function or a team.

Many document types can be stored in Confluence including meeting minutes, design documents, data sheets and how-to documents. The documents can be shared or redacted from view with the permissions capabilities of Confluence. Team members can also be notified of article updates with the "Article Watchers" functionality. If a user is designated as a watcher, they have quick access to all versions of the document. MediCenter is currently using Confluence to organize content related to customer service processes and software functionality knowledge.

### 3

#### Who's using Confluence?

Since Confluence is an organization and wiki tool, it can be used in many settings. MediCenter, a Software as a Service (SaaS) company, has decided that Confluence fits their organizational needs to provide a functionality and process knowledge base for their customer service team members. However, corporate organizations are not the only institutions taking advantage of Confluence. Prestigious educational institutions such as Brown University, MIT (Confluence is referred to as Hermes at MIT) and Harvard, have all taken advantage of Confluence's organizational capabilities.

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## 4 Why is Confluence significant in this context?

While some argue that wikis have no place in a corporate knowledge base because of their collaborative nature, wiki tools have made great strides in making sure content is reliable. With the versioning capabilities of Confluence, all users can see which users made changes to an article as well as the date and time those changes were made. This adds an additional layer of protection against carelessness in updating content. Additionally, SMEs can also play a more active role in making sure content is correct and reliable much more easily by becoming content collaborators. Prior to implementing Confluence at MediCenter, process and instructional content was stored in a series of word processing documents on the organization's Intranet. As the structure grew, searching for files became cumbersome. Searching for content within those files became next to impossible and there was very little version control. Confluence makes it easier to edit, access and manage content across the entire organization.

## 5 What are the downsides?

There are noted drawbacks to using wiki tools. Since wikis are collaborative documents, there is typically no content owner, or someone who is responsible for the integrity of the content. That is, no one person or group has oversight of the articles placed on the wiki. Using the very popular wiki site, Wikipedia, as an example, it is very easy for incorrect information to slip through the cracks because there is usually no one to immediately vet the information. Confluence is no exception. There are safeguards, however, that help prevent this issue as best as possible. Editing restrictions and version control help to assuage these disadvantages. Some think this goes against the intent of a traditional wiki.

Another drawback of using wiki tools is that without the oversight of a content owner and without planning a content structure prior to implementing the wiki, it can be difficult to organize information. Confluence allows users to create custom document structures. While this is a great feature, it leaves room for disorganization within the wiki space, making content difficult to navigate, especially if the user has access to multiple spaces.

## 6 Where is it going?

Wiki tools have changes tremendously since the inception of [WikiWikiWeb](#) in the early 1990s. WYSIWYG editors have made modifying wiki content very simple for the average user. Because of the ease of use, wiki tools have become more popular in various settings. At MediCenter, the use of Confluence began for documenting customer service knowledge.

The future of knowledge base tools is not necessarily in the tool itself, but in its available integrations. As more software companies delve into the development of knowledge base tools, such as wikis, these tools will become more integrative. Atlassian, the parent company of Confluence, already has several web-based tools available for Agile project management (Jira), help desk support (ServiceDesk) and communication (HipChat). Using these tools together provide solutions for much of what organizations are looking for.

In addition to integrations with software made by the same parent company, many web-based software tools offer Application Programming Interfaces, APIs, to transfer data between the wiki tool and seemingly unconnected systems. Confluence has a powerful API that returns data in JSON key-value pairs and allows developers to add, remove and retrieve data from Confluence. With these options for integrating Confluence with other tools in the Atlassian suite and even home-grown tools, the possibilities are endless for information sharing both internally and to end users.

## 7 What are the implications for organizations?

With the collaborative capabilities of Confluence, the immediate implications can be improved communication and collaboration. With its simplicity, it can be argued that SMEs will become co-owners of content, increasing the integrity of the content and making Confluence more reliable across the organization. One key to ensuring this goal is to designate someone as a content owner. This person would be responsible for monitoring content and questioning the authors of any controversial content.

In addition to improved knowledge dissemination, integrations provide another great benefit for organizations. MediCenter, who already uses tools within the Atlassian suite, can link knowledge base articles to support tickets by way of integrations with Jira and ServiceDesk. There is also the possibility of using the Confluence API for creating a single universal knowledge base, both for team members and clients. Developers can explore the option of retrieving data from Confluence and displaying it within their system. This allows a single data source of truth and eliminates duplicate effort across organizations.

Additionally, wiki tools such as Confluence empower learners across the organization to take charge of their own learning. Simple tools such as Confluence creates autonomy among learners. This is usually one of the primary goals at an organization – increased efficiency.

## **References**

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