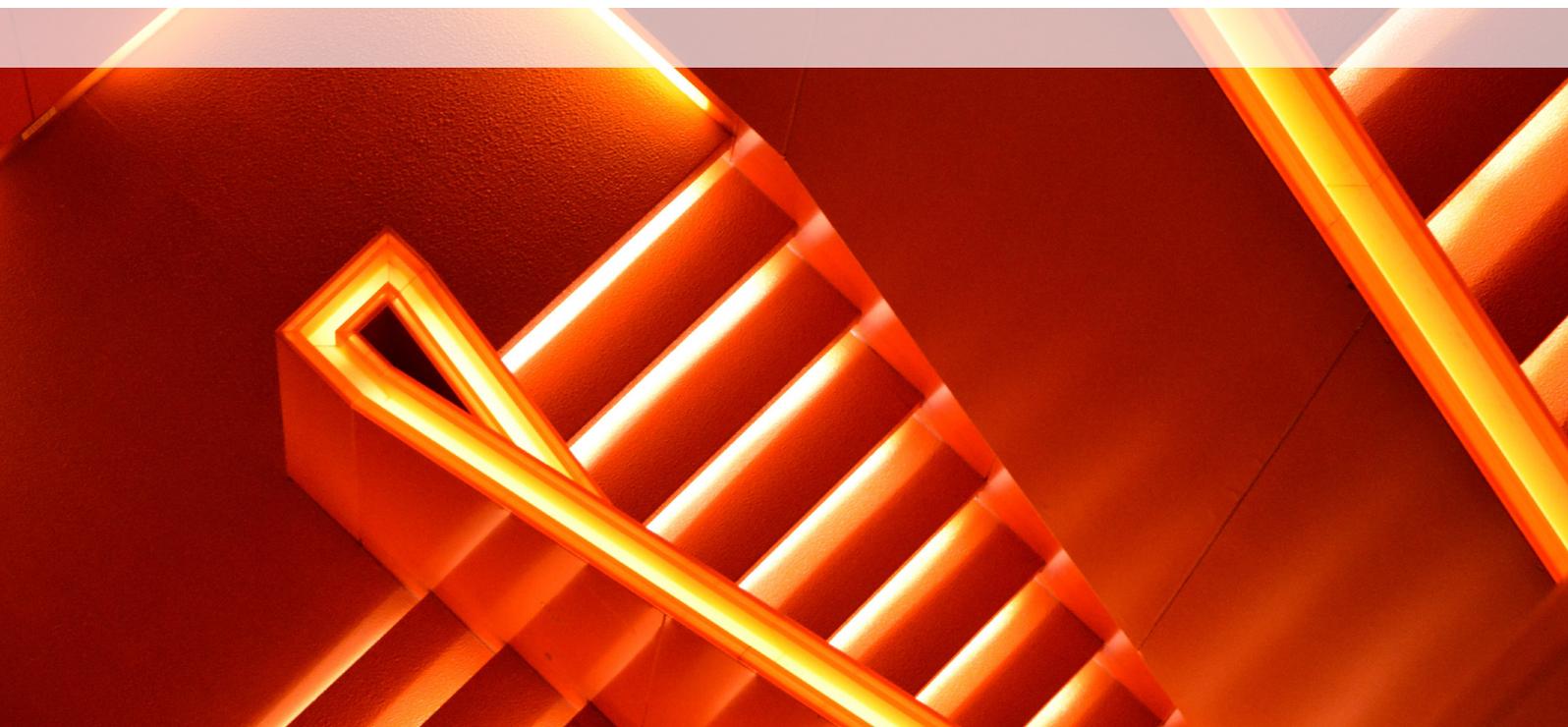


 Team Files +  Confluence +  Jira

Powering remote work with Team Files

Implementing an SSOT for files with Confluence/Jira & MS Teams



Authors



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**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.

Introduction

The year 2020 was the year of remote work. This working setup was a rising trend, already typical among many companies and industries but barely fully implemented in most of them.

The catalyst for this change was the pandemic of COVID-19, as we all know. In a global effort to slow down the disease's spread, countries implemented lockdowns, borders were closed, and we adapted our daily routines. To keep work moving while complying with regulations but most importantly, to guarantee people's safety, companies implemented and accelerated running implementations of working from home or remote work setups. It became the standard way of working almost overnight.

Business communication tools like Slack, Zoom, or Microsoft Teams, are more relevant than ever as they play a significant role in empowering people to work remotely. Many companies were already using these tools for quick messages to complement in-office interactions. Now, all the work communications need to go through digital platforms, while office meetings and live conversations aren't possible.

Working from home didn't come without its challenges, though, some relatively new, like finding a quiet spot with good Wi-Fi for a video call, other not so new, like finding the right version of a document in an email chain. Or was it in a chat window?

How can we reduce frustration and avoid wasting time looking for the right file on long email chains, chat windows, Confluence pages, or Jira issues? Now that we're all working from home and communication is spread across multiple digital platforms, having a single source of truth (SSOT) for content, documents and files became even more critical for productivity and for businesses to thrive.

This whitepaper covers how to implement an SSOT with Team Files that works with Confluence, Jira, and Microsoft Teams. You'll start getting the benefits in no time. Let's dive in.

Bridging the gap between Confluence/Jira & MS Teams

Enabling remote work

The way we work has changed profoundly in the last decades. Computers are now essential equipment in any office, phones today are way more powerful than any home computer in the year 2000, and the workplace has become global. The information technology that enables remote work has been in place for a few years, backed up by ubiquitous cloud computing that keeps getting better.

We have now in our hands “A future shaped by how we work together, not where we work.” as pointed out by Cameron Deatsch, Chief Revenue Officer at Atlassian, at the Atlassian’s Team Tour 2020 Keynote.

Having a computer with a stable internet connection is the essential hardware to allow us to work from anywhere. But that’s just one small part of it. We also need our digital tools and services to make the “where we work” part irrelevant. Different teams need different tools and services to keep the ball running, but management, communication, and storage solutions are always part of the mix.

Like Atlassian refers, Confluence is a remote-friendly team workspace where knowledge and collaboration meet. Add Jira for the Project management tools, and you have a powerful platform for the digital workplace. Microsoft Teams covers all the communication needs, from quick messages to conference calls. It also has space for all the team’s documents, with editing capabilities, thanks to the integration with SharePoint.

All these tools are great on their own, but how can we use them together to create and share content, files, and documents with ease?

The challenge

We're now sharing even more files via email, uploading to Confluence pages and Jira issues, or dragging them to chat conversations. Of course, it's convenient and fast to share a single file in a chat or email. The problem is how this works with Confluence, Jira, and file storage silos like Microsoft Teams over time.

Sure, you can easily upload files to a Confluence page or a Jira issue. But like pages and issues, files are always changing, evolving, and updated by the team. Jira and Confluence do not have a shared file structure, so if you need a file in a Confluence page attached to a Jira issue and shared in a Teams chat conversation, how do you keep track of that? What is the latest version, the one in Confluence? Jira? Or is the one in the Teams chat conversation? Who is in charge to keep all that in sync and update all the attachments? Even with the latest features from Confluence and Jira that enables teams to attach files from storages like Dropbox or Google Drive, this doesn't fix the problem because this is a one direction solution as files do not update automatically.

These unstructured practices can create a big mess of content spread across multiple platforms, making us lose a considerable amount of time looking for the right document and making sure it's the latest version. It's quite frustrating when we find out that we were working on the wrong version, right?

How can we bring all the pieces together, establishing a unique platform where your team can work together without barriers? How can we fix the chaos of files and documents in our communications platforms?

Connecting the pieces

First of all, we need to cut ourselves some slack. The shift to remote work was a big one on top of all the other challenges that we had going on in 2020. Granted that some decisions might not have been the best, but now that we have a bit more experience, we know that we can make things better. With the Team Files app, it's easy to create a single source of truth for you and your team, bridging the gap between Confluence, Jira, and Microsoft Teams. We'll help you skip the guessing game and save up to 19% of your working time.

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.”

In practice, it means we should store files and documents in the agreed storage places, the “source of truth”, and then access them directly in the tools we use daily to view and edit them, keeping everything in sync. File updates and document edits propagate to the entire system, ensuring cross-team and cross-enterprise frictionless collaboration. This is the way.

So, you can use Confluence and Jira, complemented with Teams, 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 set in Microsoft Teams, powered by SharePoint. The Team Files app also includes document editing with Microsoft Office apps to allow your team to collaborate in real-time (no file locks), knowing they are working on the right file, directly in Confluence or Jira.

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.

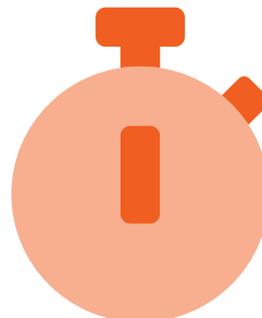
SSOT Benefits for your organization and productivity

In practice, 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.



Setting up an SSOT with Confluence/Jira & MS Teams

Build your Single Source of Truth

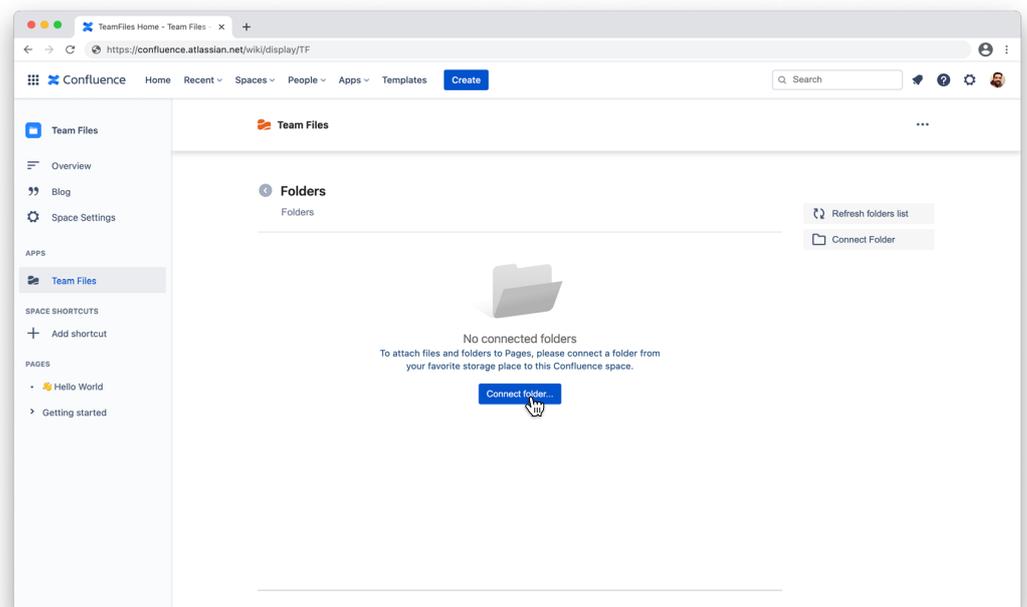
Keep your team on the same page by attaching relevant files and folders to Confluence pages and Jira issues from your Microsoft Team's SharePoint. Create a single source of truth that is always updated and without bloating your Atlassian instances.

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.

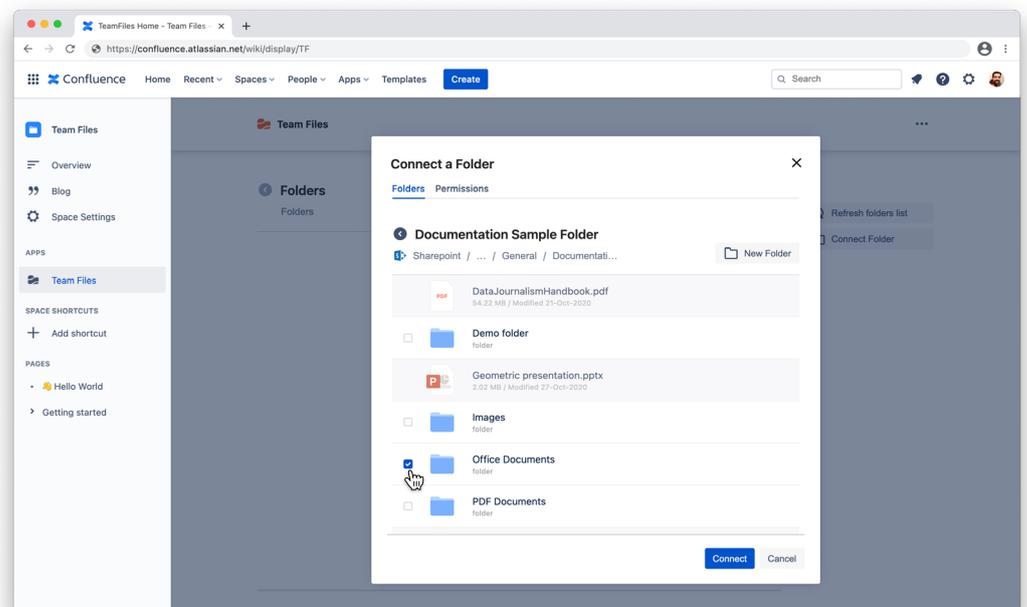


1. Open the app and click the “Connect folder” to get started.

2. To connect your Microsoft Teams, select SharePoint, and authorize Team Files to access it.
3. Select the site that contains your Microsoft Teams.

Pro tip!

If you're unsure which one it is or you can't find it in the list, click the "Find site" option and paste there the web address of your Microsoft Teams chat or group.



4. Browse the folders until you find the one you want to connect and select it. You can choose more than one.
5. *Optional:* click the "Permissions" tab to set advanced options. By default, any folder you connect will be visible and editable by your team.
6. 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.

Additional storages

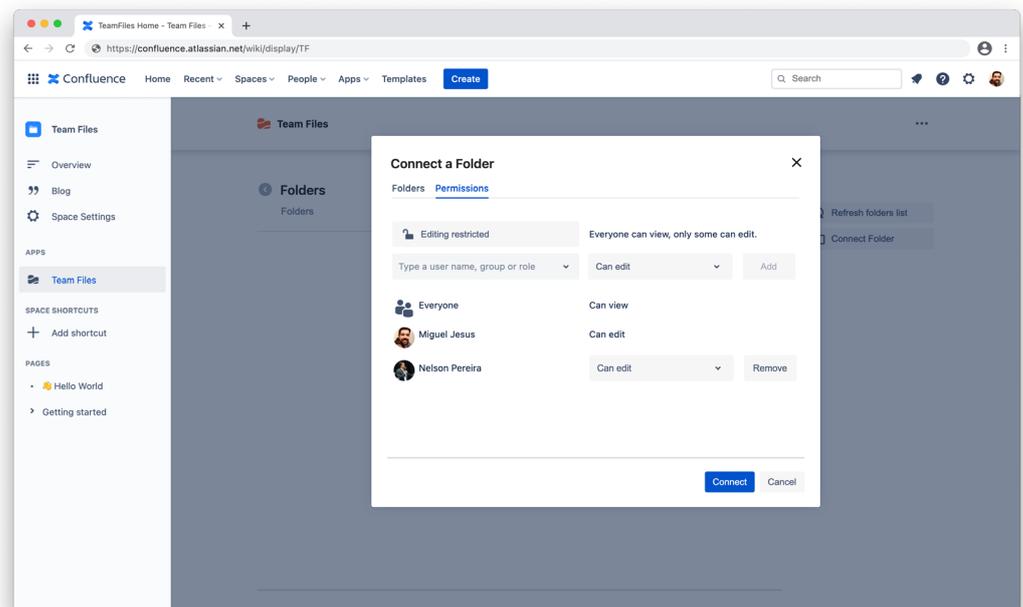
You can connect folders from all the storage places that you and your team use, including multiple accounts of the same service. Besides SharePoint, the Team Files app supports Box, Dropbox, Egnyte, FTP Servers, Google Drive (includes Team Drives support), OneDrive, and OneDrive for Business storages. 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 and set the permissions for editing SharePoint documents.

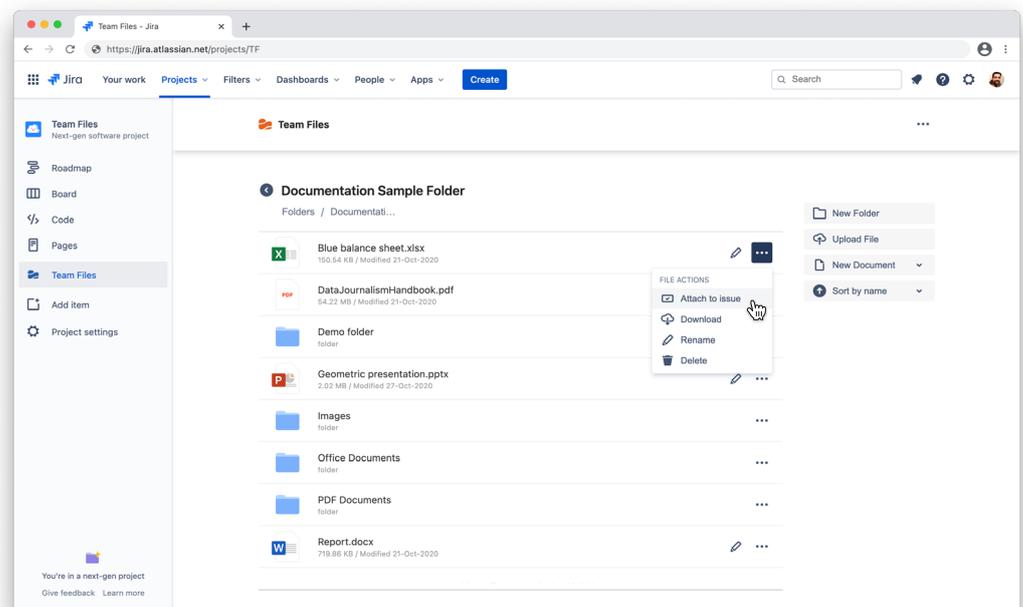
Access Permissions

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.



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!

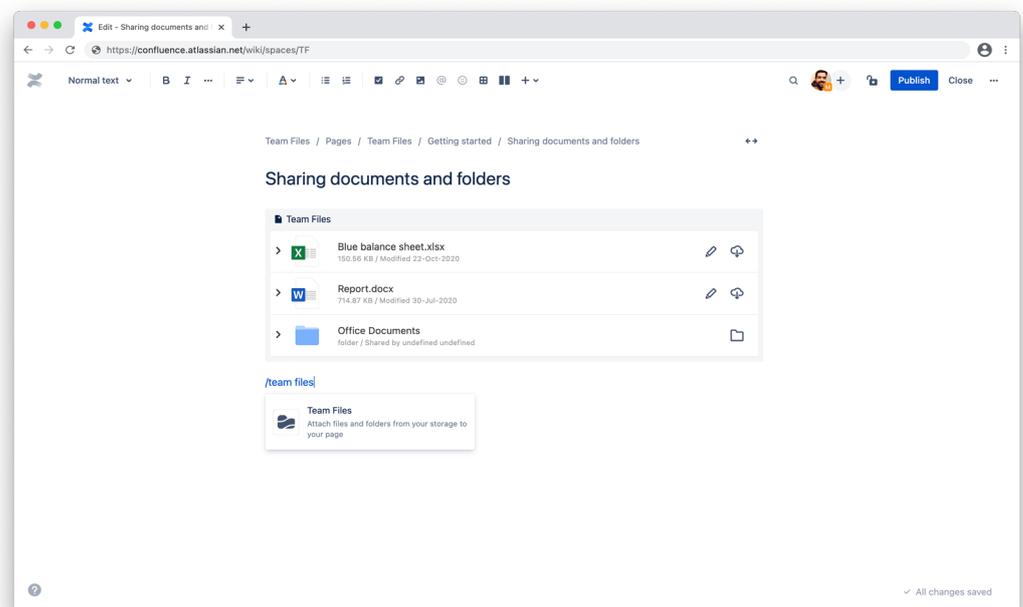
You can create new Word documents or Excel Spreadsheets, right from Confluence and Jira, to start collaborating in no time.

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.



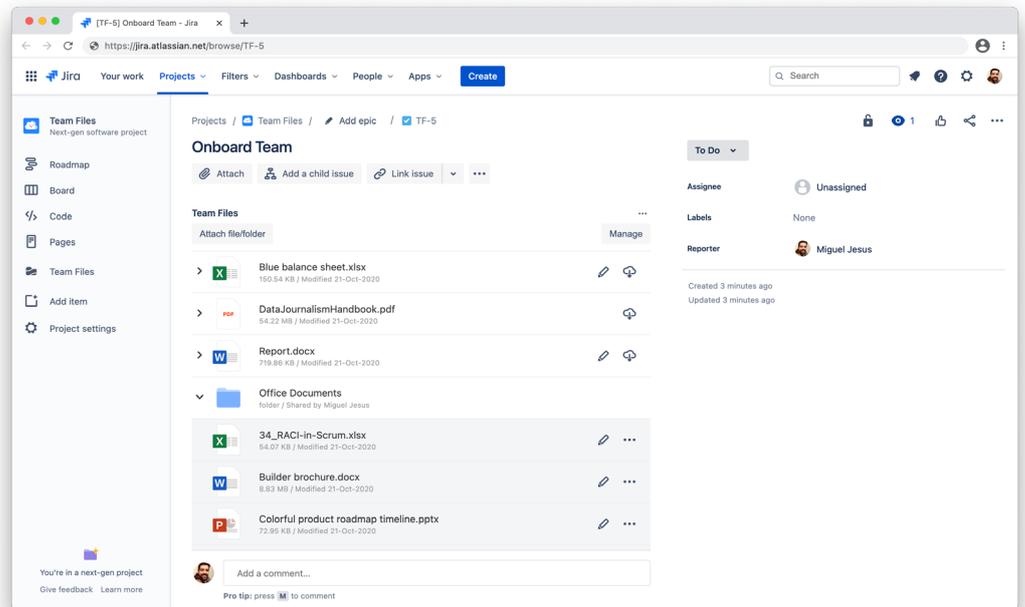
The Team Files Macro for Confluence

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 in 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. In 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.

Take-aways

Some companies like Atlassian believe that the future of the work is remote, while other companies can't wait to return to the offices. At ikuTeam, we're betting on a balance between the two. In any case, we can say for sure that work will never be the same again and that's ok.

Implementing a single source of truth for your files/documents with Confluence/Jira and Team Files and using it daily alongside Microsoft Teams will boost your team's productivity, whether it's remote or in-office work.

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:

- **Connect folders** – From Microsoft Teams chat groups to Confluence Spaces and Jira Projects.
- **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.

Sources and resources:

You can find more information on the topics covered in this paper in our Team Files Documentation: <https://teamfiles.atlassian.net/wiki/spaces/TFD/overview>

 **Team Files**
www.teamfiles.app

 **ikuTeam**
www.ikuteam.com