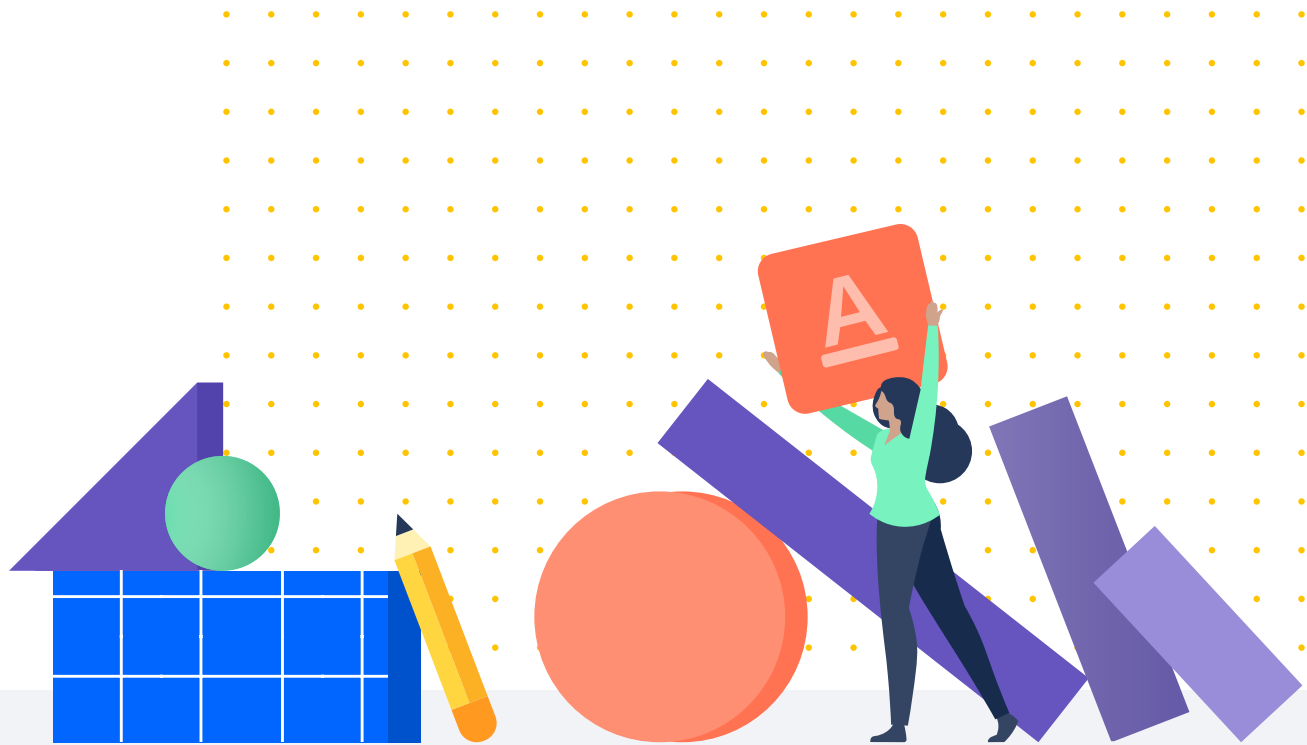




TUTORIAL

Using Confluence and Jira Service Desk together

With their powers combined, Confluence and Jira Service Desk beautifully integrate to save your team time and improve your customer experience by surfacing the information your customers or employees need to resolve their issue, fast.

In this guide, we will be focusing on using Confluence as a knowledge base for Jira Service Desk, the most common use case for this integration. Of course, there are plenty of powerful ways to use Confluence and Jira Service Desk together. The out-of-the-box knowledge base integration for Jira Service Desk is just one of the ways your team can scale IT and Support workflows with Confluence and Jira Service Desk.



Integrate Confluence and Jira Service Desk

Any Support or IT team will tell you that software doesn't always behave as you think it would. Part of being an excellent IT Manager or Support Engineer is knowing all the edge cases that aren't necessarily written in the product documentation – the tricks of the trade, go-to answers, common issues, and workarounds that resolve issues that otherwise seem complex.

But what if you could capture the knowledge your veterans have accumulated over the years? The Confluence knowledge base integration for Jira Service Desk does just that. The Confluence knowledge base gives your team a place to centralize and organize all customer-facing (or employee-facing) FAQs and documentation, and a private workspace where your team can share best practices and institutional knowledge. That way, no one ever starts from scratch; everyone is equipped with insights from past work, and customers receive standardized answers that the whole team has reviewed.

Once you link your service desk project to a knowledge base, the articles you publish in the knowledge base will automatically display in your service desk's knowledge base. This improves your customer experience by surfacing answers more quickly and, in some cases, without ever having to ask for help. Everyone with view access to your service desk can view articles (pages) you publish without a Confluence license. You only need Confluence licenses for team members who create and update articles.

To create a page that's visible to only your team, just use Confluence page permissions to restrict internal articles to only your team members. Restricted pages won't appear in the help center, but your team can reference them while they work on issues. To learn more about knowledge base access and permissions, [read this documentation](#).

To create your team's new knowledge base and link it to your service desk project:

- 1 From your service desk project, go to **Project settings > Knowledge base**.
- 2 Choose **Link to a Confluence space**. You can link a space to a service desk project if Confluence and Jira Service Desk have the same Atlassian Cloud domain name. You can also unlink or change Confluence spaces whenever you like.
- 3 From the application dropdown, select the Confluence site you want to link to.
- 4 Select the space name or **choose Create a knowledge base space**. If you create a new knowledge space, name the space.
- 5 Tap **Next**.



PRO TIP

To create a new space in Confluence, you need the global Confluence administrator and Create space permissions in Confluence. To manage these permissions, go to your Confluence global permissions.



What's a knowledge base and do I need one?

A knowledge base (KB) is a place where you can store FAQs, how-to and troubleshooting articles, and other helpful info that your team and customers may need to reference.

The information you store in a knowledge base goes beyond what's in your documentation, typically covering edge cases or complicated scenarios that go beyond what users of your software need to accomplish basic tasks. While knowledge bases can be self-serve, it's more likely that a member of your IT or support team will send the right article to the customer after working with them to understand their specific case.

[Learn more](#)

Integrate Confluence and Jira Service Desk

Next, it's time to add articles to your knowledge base to help customers help themselves. Start by creating documentation that answers the most common FAQs. If you're on the front lines fielding questions every day, you probably don't even need to look at support issues to know what questions come up the most often. Start there.

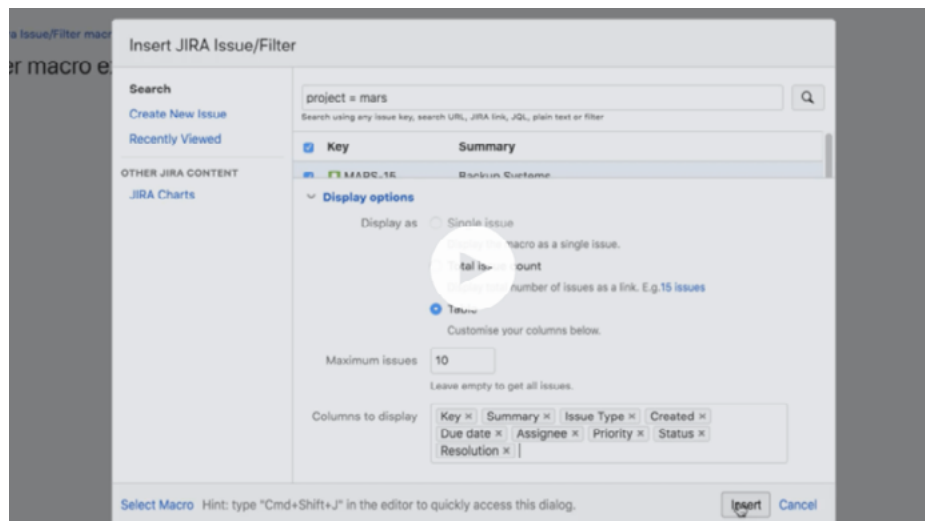
Luckily, your knowledge base comes equipped with everything you need to get started, including article templates, and a pre-configured overview page with the [livesearch](#) and [content by label](#) macros. As you're making your first article, these few tips and tricks will help you get started on the right foot:

- 1 **Standardize your content with templates:** Use the [how-to](#) and [troubleshooting](#) article templates to standardize the look and feel of your articles and make the process of creating new knowledge base articles super simple for your Service Desk agents. Don't forget, templates are completely [customizable](#)! So you can set up the template with all your organization's standard information and brand formatting and let your agents take it from there. The more guidance and structure you can put in your template, the faster your team can create great articles.
- 2 **Customize the look and feel of your space:** Simple changes like a space logo and welcome message can make a huge difference in your customer's experience and ensure consistency in your organization's brand image. To learn more about customizing the space logo, color scheme, and theme of your Confluence pages, [check out this documentation](#).
- 3 **Proactively display known issues:** Use the [Jira Issues macro](#) to provide a link to any known issues that relate to the article. The macro provides real-time status updates, which keeps the customer up-to-date and cuts down on duplicate tickets.
- 4 **Label and organize your content:** Although there is a keyword search functionality in Confluence, using Confluence labels will make it easier to find information. You can use the Confluence [content by label](#) macro to organize content and map your service desk requests to specific labels to highlight the most relevant content. While this might seem tedious, it will help you scale operations as your knowledge base grows.
- 5 **Integrate knowledge management into your support or IT workflow:** Oftentimes, important information is shared within service desk issues, but it gets lost in the shuffle. With the knowledge base integration, your team can capture and document valuable information without interrupting their flow – in one click, agents can create a new article directly from a service desk issue. See below for more detailed instructions.

Find more in-depth best practices for self-service knowledge bases [here](#).

Recommend knowledge base articles in your service portal

Once you've created knowledge base articles, customers can automatically see recommended articles as they type their requests into Jira Service Desk, like magic. All you have to do is enable auto-search for request forms from your settings, and you'll be closing up that to-do list in no time. For step-by-step instructions on how to enable auto-search, [read this documentation](#).



As soon as the customer finds a relevant solution, they can read it right from Jira Service Desk. The process is lightning-fast and intuitive for customers, and deflects common requests before they are submitted.

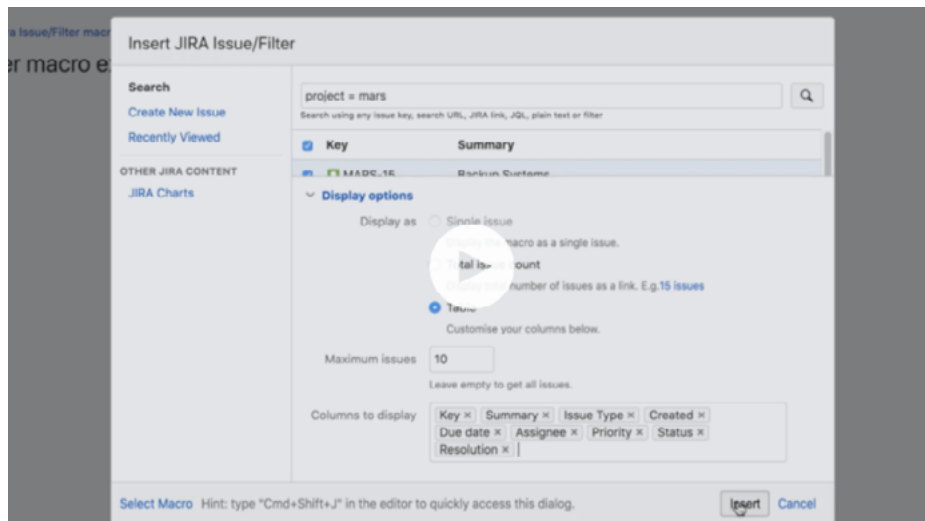


PRO TIP

Use labels to restrict which articles are returned in the search results. For example, if you have a wifi access request type, you can label relevant articles with the label 'wifi' and the knowledge base will only suggest articles that have the 'wifi' label.

But even with the best knowledge base, not every request can solve itself. That's where the seamless connection between your service desk project and your team's knowledge base comes into the mix. Agents can reference articles while they work in your service desk, making it easy to share articles with customers without interrupting their workflow.

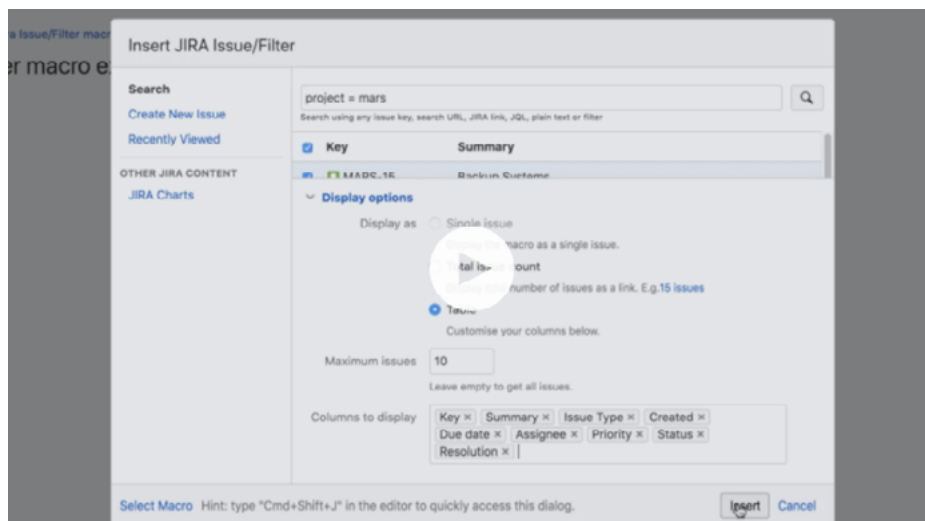
You can search and view knowledge base articles in the **Knowledge base** section of your Jira Service Desk and quickly jump into Confluence to edit articles when needed.



Agents can also find related knowledge base articles related in the **Knowledge base** section of any Jira Service Desk issue. Just tap **related articles** to search the articles associated with an issue.

If an agent is looking for an article and comes up short, the Jira Service Desk to knowledge base integration makes it easy to create new articles from useful information in a request. In one click, the agent can create a new article directly from a service desk issue.

Tap on the arrow next to **related articles**, tap + to create a new article, pick a template, and tap **create**. You'll be taken directly to your Confluence knowledge base where you can publish a new article. What's more, it takes one click to jump back to their service desk issues. Future tickets averted, whew!



Keep improving your customer service with knowledge base insights

Now that you've created your knowledge base, it's time to learn what content is working best. Gathering customer feedback is essential for improving your content and- everyone's favorite!- deflecting more tickets.

Capturing customer feedback

The simplest way to get customer feedback is by including a quick survey at the end of each knowledge base article. The thumbs up and down icon functionality make it easy to get a quick pulse on customer sentiment.

Looking for even more feedback? The [Forms for Confluence](#) app allows you to create custom surveys and store responses directly in your Confluence internal database. Or, you can open up the line of communication with your customers by allowing licensed users (or anonymous users) to comment on knowledge base articles. This is a simple way to connect with your end-users and use feedback to improve your content over time.

Knowledge base reporting

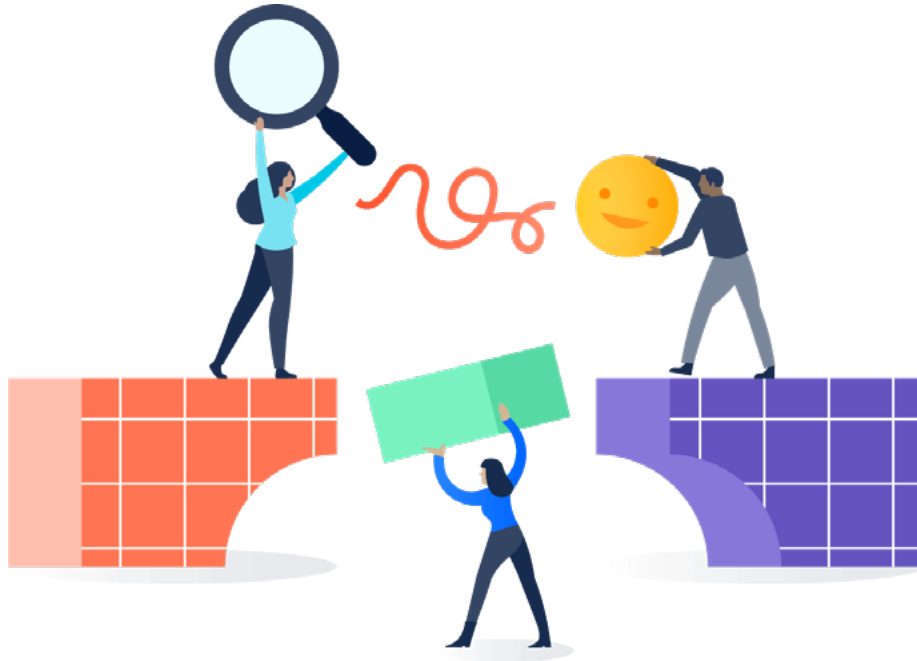
If you're looking for quantitative data to prove the success of your shiny new knowledge base, look no further than the deflected and resolved request insight reports.



The reports help you understand how your audience is responding to your knowledge base articles by illustrating how often an article is shared, viewed, and voted as helpful. You can even see how many requests were resolved with an article, without an article, and which requests were entirely deflected in the portal.

To see your reports from your service desk project, go to **Reports**.

[Read more about knowledge base reports here.](#)



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