

[TO-4193] IT Confluence Space Standardization & Cleanup Initiative

Created: 27/Jun/25 Updated: 07/Nov/25 Due: 10/Oct/25 Resolved:

15/Oct/25

Status:	Closed
Project:	Technology Operations Board
Components:	None
Fix versions:	None

Type:	Epic	Priority:	High
Reporter:	Solounge Bowen	Assignee:	Solounge Bowen
Resolution:	Done	Votes:	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	6 hours		
Original estimate:	Not Specified		

Issue links:	Post-Incident Reviews			
	reviews	TO-4450	Access to Dahura – Swansea Location	In Progress
	reviews	TO-4495	Meraki Login	Closed
	reviews	TO-4444	Verkada Pass/Command experiencing gli...	Closed
	reviews	TO-4449	Troubleshoot Access to Luma – Wicker ...	Closed
	reviews	TO-4451	Troubleshoot Access to Open Path – Au...	Closed
	is reviewed by	TO-4346	Need to be able to open .xml files	Closed
	Relates			
	relates to	TO-4316	Remove Generic PC Nextiva Accounts	Planning
[Tech Ops] Vendor/ Issue Type:	Project/ Workflow/ DevOps - Jira/Atlassian			
[TO] Key Performance Indicator:	Data Capture Rate, Data Quality & Safety Improvement, IT, Reduction of time/workload			

KPI Measure:	Standardized IT Confluence space with 100% system documentation coverage, improving internal search efficiency and reducing Help Desk resolution time through consistent, easily accessible resources.
Request participants:	
Secondary:	Zachary Mchayle

Description

Background:

The current IT Confluence space lacks alignment with the standardized structure used across other department spaces. This creates inconsistency, makes information harder to locate, and impacts collaboration. The goal of this project is to audit, clean up, and reorganize the IT Confluence space to match the company-wide layout, improve usability, and support scalable documentation practices.

Objectives:

- Align the IT Confluence space with the company's global documentation standards
- Improve navigation and content discoverability
- Remove outdated or duplicate pages
- Establish clear ownership and page maintenance guidelines

Next Steps:

1. Audit Existing Pages

- Export or list all current pages under the IT space
- Identify outdated, duplicate, or redundant content
- Flag high-priority pages that are accessed frequently

2. Review Company-Wide Structure

- Reference 1–2 other department Confluence spaces that follow the company standard
- Note their sidebar layout, parent/child page structure, naming conventions, and formatting styles

3. Propose a New Page Layout

- Create a draft structure (e.g., Home > SOPs > Tools > Projects > Knowledge Base)

- Identify where existing content can be moved or consolidated

4. Collaborate with IT Stakeholders

- Present the proposed layout to key IT team members
- Gather feedback and adjust accordingly
- Assign page/topic owners for future maintenance

5. Clean Up and Migrate

- Archive or delete outdated content
- Move and reformat pages based on the new structure
- Update permissions or restrictions if needed

6. Publish & Communicate

- Finalize the structure and publish updates
- Send out a team-wide notice or quick video walkthrough of the new layout
- Create a recurring review cadence (e.g., quarterly) to keep things tidy

Follow Up:

References:

- <https://kindbody.atlassian.net/wiki/spaces/II/overview>
- https://docs.google.com/spreadsheets/d/1v5_fa9Ka2HapgmfLz_yniCKBcKPpmGzgIVvIQ-BT36E/edit?gid=0#gid=0
- https://docs.google.com/spreadsheets/d/1fnL_BFn63HQPSGCOa8F0o1XKcHDcHnaG3PuSMPC11B8/edit?gid=0#gid=0

Comments

Comment by [Solounge Bowen](#) [25/Jul/25]

Updates/Review

- Had a meeting with lori where we began to review the list of systems monitored by Help Desk
 - https://docs.google.com/spreadsheets/d/1v5_fa9Ka2HapgmfLz_yniCKBcKPpmGzglVvIQ-BT36E/edit?gid=0#gid=0
- Decided this would be a great approach to updating the workflow and the confluence page

System/SaaS	Notes/Comments
OpsGenie (new name Jira On- Call)	[NEED DOCUMENTATION] - https://kindbody.atlassian.net/jira/settings/products/ops/schedules
LucidChart	[NEED DOCUMENTATION] Need Service account for Helpdesk to administrate - confirm okay with Matt
PagerDuty	[NEED DOCUMENTATION] Need to review the escalation Need Service account for Helpdesk to administrate - confirm okay with Matt
Google (Calendar, Drive, etc...)	[NEED DOCUMENTATION]
Lumos	[NEED DOCUMENTATION]
Printers/Scanners	[NEED DOCUMENTATION]
Azalea Access	[NEED DOCUMENTATION]- Solounge to update SOP
Adobe	[NEED DOCUMENTATION]
Microsoft (Office apps)	[NEED DOCUMENTATION]
Nextiva	<ul style="list-style-type: none"> • but also working with the following users but also ensuring that it doesn't affect the loss rate and answer rate <ul style="list-style-type: none"> ◦ Suha ◦ Missy ◦ Darnisha ◦ Katie ◦ Andrea ◦ Robert • Need Generic Cleanup for Nextiva (Call Flow Update) <ul style="list-style-type: none"> ◦ Made a ticket of one of the steps but need an overall project ticket https://kindbody.atlassian.net/browse/TO-4316 ▪ <ul style="list-style-type: none"> ◦ Need to look into Nextiva Fax ◦ Nextiva usually keeps their support documentation to do date ◦ https://docs.google.com/document/d/14mqjypLDjthn0jVcOzl5-14rFwICnC_BMdqmW6dhIxQ/edit?usp=sharing

Sonos	<p>[NEED DOCUMENTATION] In Keeper there are log in accounts that we can sign in and look for documentation</p> <p>Current SOPs</p> <ul style="list-style-type: none"> • https://kindbody.atlassian.net/wiki/spaces/II/pages/718536719/Sonos (2022) -SOP Needs • Moving speakers to different clinic (take off one account to the next location account) • Adding Speakers • The Specs of the Speaker type • Common troubleshooting
Keeper	[NEED DOCUMENTATION]
Mosyle MDM	<p>[NEED DOCUMENTATION]</p> <ul style="list-style-type: none"> • Will need to work with Lori on Managing the computers connected • https://kindbody.atlassian.net/jira/servicedesk/projects/TO/queues/issue/TO-4341 • Need to look into Google Workspace Directory Sync error within Apple Business Manager <ul style="list-style-type: none"> ◦ Error “ you must federate a domain” ◦ This may be affecting new hires ◦ Cindy had worked with users on this
Network issues (Clinic)	<p>[NEED TO ADD INTO CONFLUENCE]</p> <p>https://docs.google.com/document/d/17dK5cL4rwQUeUh8Z8e5ukU9ukCYLIqulP5IgHpJJJoAM/edit?tab=t.0#heading=h.f5ebgpm2mvfz</p>
Network issues (remote)	[NEED DOCUMENTATION]
Connectwise	[NEED DOCUMENTATION]
Tricefy	[NEED DOCUMENTATION]
RI Witness	<p>[LORI WORKING ON DOCUEMENTATION]</p> <p>https://docs.google.com/document/d/19Mo7mNcP9HK0tp8pfhzTB1Zxp3YcdZRZdkKJKXx5w80/edit?usp=sharing</p>
HubSpot	<p>[NEED DOCUMENTATION]</p> <p>Service account stored in keeper under it@kindbody</p>
Jira/Atlassian	<p>[NEED DOCUMENTATION]</p> <ul style="list-style-type: none"> • Need documentation about the roles and onboarding new users into Jira • SOP Needs <ul style="list-style-type: none"> ◦ Need to discover Guest to User ratio ◦ Confluence user access needs to be cleaned

	<ul style="list-style-type: none"> ◦ Need to review users who actually need Jira ◦ Groups - all users are synced from Google ◦ No documentation on who should be in certain groups ◦ Need to look through the Jira groups and find where they are stemming from Google
Slack	<p>[NEED DOCUMENTATION]</p> <ul style="list-style-type: none"> • Triage workflow • User Administration • Member administration • Internal User Mgmt • Slack Integrations • External Connections (3rd party vendors) - will need to loop Lori and Matt
Stripe	<p>[NEED DOCUMENTATION]</p> <ul style="list-style-type: none"> • Need to confirm which roles need to be standardized for Stripe and review with Karina . once updated , change rules Lumos • Needing access to all locations Kindbody 360(Virtual & Kindbody EOS)
Signature Satori	<p>[NEED DOCUMENTATION]</p> <ul style="list-style-type: none"> • Need to find a way to exclude archived users so that they are not coming into signature satori • Scenarios <ul style="list-style-type: none"> ◦ Address for a location is not showing the correct location <p style="text-align: center;">**</p>
Zoom	[NEED DOCUMENTATION]
RMail	[NEED DOCUMENTATION]
ChangeHealthcare	<p>[NEED DOCUMENTATION]</p> <p>https://kindbody.atlassian.net/wiki/spaces/TechOps/pages/1648099362/Change+Healthcare</p>
AWS	[NEED DOCUMENTATION]
Account Merges (KEMR)	[NEED DOCUMENTATION]
KEMR issues (not merges)	[NEED DOCUMENTATION]
KEMR Patient Portal	[NEED DOCUMENTATION]
Azalea Internal Issues	[NEED DOCUMENTATION]
Trellis A.K.A. Orchard	[NEED DOCUMENTATION]
Verkada	[NEED DOCUMENTATION]

ADT	[NEED DOCUMENTATION]
PDMP	[NEED DOCUMENTATION]
SMTP	[NEED DOCUMENTATION]
Claimscape	[NEED DOCUMENTATION]
HoneyBadger	[NEED DOCUMENTATION]
GitHub	[NEED DOCUMENTATION]
Lessonly	[NEED DOCUMENTATION]
Iorad	[NEED DOCUMENTATION]
Expensify	[NEED DOCUMENTATION]
TeamPay	[NEED DOCUMENTATION]
Insurance Portals	[NEED DOCUMENTATION]
Metabase	[NEED DOCUMENTATION]
ADP	[NEED DOCUMENTATION]
Hybrent	[NEED DOCUMENTATION]
Klara	[NEED DOCUMENTATION]
OpenPath	[COMPLETE]
Axis	[NEED DOCUMENTATION]
Luma	[NEED DOCUMENTATION]

Comment by [Solounge Bowen](#) [28/Jul/25]

Updates

- Beginning to re-structure the IT Internal, so far cleaned up the initial intro page
 - <https://kindbody.atlassian.net/wiki/spaces/II/overview>
- Created a Technology Project & Implementation Hub that captures all Technology projects in 1 place
 - <https://kindbody.atlassian.net/wiki/x/JoBvpw>
- Set the tools covered into categories
 - https://docs.google.com/spreadsheets/d/1fnL_BFn63HQPSGCOa8F0o1XKcHDcHnaG3PuSMPCl1B8/edit?gid=0#gid=0

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Next Steps:

- Going through the list in the ticket from the Triage list

- Looking to see if there are existing documentation living in the IT Internal , Add that link into the comment next to the system name
- If there are not any existing documentation, proceed to create an SOP(s) capturing the following
 - **Access & Permissions** — How to request, grant, or revoke access
 - **Usage & Configuration** — Key workflows, supported OS instructions, screenshots
 - **Troubleshooting** — Common issues, logs, known fixes
 - **Integrations** — How the tool connects to other platforms (e.g., Slack, Jira, Google)
 - **Point of Contact** — Primary admin or subject matter expert
 - **Change Log / Updates** — Last updated and system changes
- Need to determine **Documentation vs SOP**
 - **Documentation**-> General information, explanations, and technical reference materials about a tool, process, system, or project.
 - **SOP** → Step-by-step written instructions for completing specific, **repeatable operational tasks**.
 - If **documentation** , label article **kb-it-parent**
 - If SOP , label article **kb-it-sop**

We are prioritizing what is already being used vs. what is already there as it will save us going through unused things. As we go this route, the ones that are used will be renamed & the ones that are not needed we can simply archive/and or delete

Comment by [Solounge Bowen](#) [28/Jul/25]

Created IT Documentation Best Practices

<https://kindbody.atlassian.net/wiki/x/AQB7pw>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/20873363/Creating+a+Confluence+Page>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2809790484/Writing+Guidelines>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2809757742/Tagging+Labeling>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2809790494/Sample+Page+Template>

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- Built a template for System's parent page
 - **IT Parent System Page Template**
- Created Parent Pages for the following Systems:
- <https://kindbody.atlassian.net/wiki/x/I4CRpw>
 - [https://kindbody.atlassian.net/wiki/spaces/II/pages/2811232266/TeamPay?](https://kindbody.atlassian.net/wiki/spaces/II/pages/2811232266/TeamPay?atlOrigin=eyJpIjoiMDFiMDIxYWRRmNmExNGNkZmJhMDkxNWQ3YzdiNTkyMjUiLCJwIjoiYyJ9)
atlOrigin=eyJpIjoiMDFiMDIxYWRRmNmExNGNkZmJhMDkxNWQ3YzdiNTkyMjUiLCJwIjoiYyJ9

- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811560599/Expensify?atlOrigin=eyJpIjoiNmM2YzI0Yjk2OGMxNDA5MWI5MjM3MjYwM2E2NTVhMmEiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811396158/Stripe?atlOrigin=eyJpIjoiZThhYjg2NDNhNzNmNDE5YzgWYTJjM2YzZDM1MWVhODEiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811363368/Claimscape?atlOrigin=eyJpIjoiYzQ5MmRIY2Q3OTFINGEwYTIjMGY3Yjc3Nzk0NGY1MTEiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811887617/Communication+Collaboration?atlOrigin=eyJpIjoiYjhiNjQwYTFmOWJmNDdjNGI5ODBINWQ1MGRIYTQyNGEiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811265077/Slack?atlOrigin=eyJpIjoiYjMwYWY5YmIwZDkxNDM5NjIjNTQ2OGQzNjU0Zjg0OTEiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811592785/Zoom?atlOrigin=eyJpIjoiMDFkNjZkOGQwMWE4NDZkMDIjYmEwOGI0Yzc4NjUxZTEiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811363398/Google+Workspace?atlOrigin=eyJpIjoiZDU1MjBiZTc2ZTMzMGM1ZmFhZTtxYzYmOTdiZWVhZGUiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811232330/Microsoft+365?atlOrigin=eyJpIjoiNzVkMjRkNDIxZjY3NDdkZWl5Y2E5OWM4ZjZhODZjMWQiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811691109/Nextiva?atlOrigin=eyJpIjoiMTNkM2Q1YWNkYTFINGZjZmE5OWYwMjAwOTQ5MjYyMmliLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811265144/RMail?atlOrigin=eyJpIjoiNGM0MDUyNWM0YWRiNDJkNjY5YmEwOGI0Yzc4NjUxZTEiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811330680/Signature+Satori?atlOrigin=eyJpIjoiOWMzZWQyOGEzODIhNGUzYWE5Zjg0NzdmNjg0NzBIYTkiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811854849/Clinical+Tools+Integrations?atlOrigin=eyJpIjoiN2ZhODJmNTg3OGY1NDUzZGlxYjI0ZWVhZmZxZjMwNWVhZGUiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811330634/ChangeHealthcare?atlOrigin=eyJpIjoiMTE4ZjZjZjYyZjYkNDI1MDIhNjYhMzU1NDIhM2FkNjkiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811592755/Tricefy?atlOrigin=eyJpIjoiMmQ0NDMwYmRjNGIzNGYxZWVhZjYyNjY1MDIhM2FkNjkiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811560611/RI+Witness?atlOrigin=eyJpIjoiOTE0MWUzOTZkNDM5NDYyZWVhZmZxZjYyNjY1MDIhM2FkNjkiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811560622/PDMP?atlOrigin=eyJpIjoiN2E5ZGQwNWNmNDMyNGFIZmFjYUw1ODg5NzhkMDQwNzQiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811363384/Metabase?atlOrigin=eyJpIjoiOGJiZDQyNzZhMGE2NDRIZWVhZmZxZjYyNjY1MDIhM2FkNjkiLCJwIjoiYyJ9>

- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811920385/Device+Endpoint+Management?atlOrigin=eyJpIjoiNDFlNmVjZjExMDE3NGU4ZjliNDIyNjIwYmY3M2QzZTUuLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/x/A4CVpw>
- <https://kindbody.atlassian.net/wiki/pages/resumedraft.action?draftId=2811887629&draftShareId=193d28ba-6f8c-4e04-b2ab-a578b411d85f&atlOrigin=eyJpIjoiZThkMjhlZDAzZGMzNDczOWE3YTY5Zjg1MGNINzBhZTgiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811953153/Knowledge+Learning+Management?atlOrigin=eyJpIjoiZTFmZmEwMjJmM2U0NGRjNTIknjE3ZTBmMzc0OGVhZGllLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811920397/Network+Infrastructure?atlOrigin=eyJpIjoiNDEyMTgxNzhhNWM2NDNkMDhiZDI1YTMzMTRiYmliLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811985921/Project+Workflow+CRM?atlOrigin=eyJpIjoiNTNhYzZiOWI5YWYzNDA1Mjg4ODU0MzM5NWM1NDg4NzEiLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/x/CQCTpw>
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2811592724/Pagerduty?atlOrigin=eyJpIjoiNTAwMTdkNTNmYjgzNDU3OWIwYzg2Y2RmZjVINWVlODIiLCJwIjoiYyJ9>

Once I create the parent page for the system I have linked it to the internal tools & system guide article

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2809004058/Internal+Tools+System+Guides?atlOrigin=eyJpIjoiYjliMjAwZWl3YWM1NGYwZjY5YjQwYzhINzFkZTAzN2MiLCJwIjoiYyJ9>

Comment by [Solounge Bowen](#) [29/Jul/25]

Next Steps, complete the parent pages for the following systems within the following category

- Categories that need system Parent pages created

Comment by [Solounge Bowen](#) [04/Aug/25]

Created the following SOP's

- Stripe
 - <https://kindbody.atlassian.net/wiki/spaces/II/pages/2819129349/Setup+Configuration?atlOrigin=eyJpIjoiZTYzZjZkZWVhZGMzNDczOWE0MzM0ODY1YjZhYjk1YTliLCJwIjoiYyJ9>
 - <https://kindbody.atlassian.net/wiki/pages/resumedraft.action?draftId=2819424260&draftShareId=3dd32758-875e-4f9e-a71c-6cab08b07207&atlOrigin=eyJpIjoiNGJmYzZjZmQxZDIjNGYyYmEyZTVhYTkyY2Y3MmRhOWUiLCJwIjoiYyJ9>

Comment by [Solounge Bowen](#) [06/Aug/25]

Created the following SOPs for OpenPath

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2822307886/OpenPath?atlOrigin=eyJpIjoiYzI4N2RmZWYyMGI4NDQzNjlkODIyNzIxNWl0NWU4NGUjLCJwIjoiYyJ9>

Comment by [Solounge Bowen](#) [07/Aug/25]

Created SOPs for Claimscape

- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2823684117/Claimscape+Setup+Guide?atlOrigin=eyJpIjoiYmZiYTk0NTE3OTE0NGJjOTNmY2NjZmY1ZTUxNDJjZDAiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2823749654/Claimscape+Standard+Use+Procedures?atlOrigin=eyJpIjoiYzk4OTUzMjVhNDBkNDNkOWE3MGI1YWlxYTUzY2Q0Y2EiLCJwIjoiYyJ9>
- <https://kindbody.atlassian.net/wiki/spaces/II/pages/2823389207/Claimscape+Troubleshooting+Guide?atlOrigin=eyJpIjoiMDEyM2JkZWRhMjk2NGYxMWE5MGM3MWE2YzY4ZDg0OGUjLCJwIjoiYyJ9>

Comment by [Solounge Bowen](#) [11/Aug/25]

SOP created for Jira

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2826010671/Generating+a+Jira+Ticket+from+a+Slack+Message+Jira+Cloud+Integration>

SOP for Stripe → <https://kindbody.atlassian.net/wiki/x/FgB9q>

Comment by [Solounge Bowen](#) [20/Aug/25]

Created SOPs for Brother scanners

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2838331401/Brother+Scanners?atlOrigin=eyJpIjoiMDgzYzMwMjk4YmM2NDc1NDhjZDQzM2JmMzg2NjBINmUiLCJwIjoiYyJ9>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2838134821/Brother+Scanner+Setup+Guide?atlOrigin=eyJpIjoiYzVmZTdlNmQ1MjAyNDg3MGE0OWI4YzQ3YWNjNTUzYWQjLCJwIjoiYyJ9>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2840494083/Brother+Scanner+Cloud+Services+Setup+Guide?atlOrigin=eyJpIjoiOGE0YTZmNTQyYmQxNGI5NmI4MTI0Y2IyZmNmOWU1MGIiLCJwIjoiYyJ9>

<https://kindbody.atlassian.net/wiki/spaces/II/pages/2838265881/Brother+ADS-4700W+Scan-to-Google+Drive+Not+Working?atlOrigin=eyJpIjoiMTQ1ZjYzNWU3ZjJkNDNIMzk2MGViZDk5ZTE4OWJlOTYiLCJwIjoiYyJ9>

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