This document is a brief summary of the SBSEG Commercial Technology (Com/Tech) library project idea. It outlines the problem, solution, goals and next steps of the project.

# Context

This research project examines how to design a documentation portal so that SBSEG Sales and Marketing can easily connect with and understand what Com/Tech does.

# Customer problem

The problem is one of a clear communication path and proven trust between Com/Tech and Sales and Marketing. It isn’t clear to Sales and Marketing what exactly Com/Tech does or how they, themselves, are actually dependent on Com/Tech. Laura identified the following set of Sales & Marketing **pain points** regarding this problem:

* I don’t know how to ask Com/Tech for help.
* I don’t know Com/Tech capabilities.
* I don’t know about new Com/Tech things that can help me.
* I don’t know when new Com/Tech things are being released that can help me.
* I make plans based on assumptions and not a source of truth.

These problems make the Sales and Marketing team feeldisconnected and abandoned from the larger group of who we are together under the SBSEG umbrella.

# Solution and goals

Our solution to solve the pain points listed above is to design and create a Com/Tech information knowledge base specifically for Sales and Marketing. This knowledge base is designed and maintained so they have clear visibility into Com/Tech organizational operations. The knowledge base platform does not dictate how Com/Tech stores their work as they develop and release products. It is a target space with content for cross-team communication designed for Sales & Marketing use and edification.

Today, documents containing ideas, plans, and solutions are created, saved, and archived without little or no guidance as to the relative value of other neighboring files and folders. This creates an untenable stack of information left for individuals to sort and evaluate on each search session. This is not unusual in corporations today and is a [current problem being addressed](https://drive.google.com/file/d/1MY17EHBbCEESkHNi9E8q1fXk3VNCelWE/view) across all industries. ([see Note for solution forms](#xrv7774apcuj).)

## Content

The files in the knowledge base must inform viewers as to each Com/Tech group’s:

* purpose
* organization
* vision and goals
* capabilities-a place for Sales and Marketing focused:
  + release notes
  + videos
  + user guides
  + other informative files
* processes
* rhythm of releases
* roadmap

The file format types defining the actual content can be of any sort that communicates information to the end users, such as PDF, video, slides, et cetera. The best practices of file types definition are out of the scope of this project. The only overlap in defining formats is that it must be supported and run on the platform and is recognized by the viewer as a source of consumable information.

## Platform

The platform of the knowledge base must be provide highly confident interactions between content providers and users. The platform must address the following requirements:

* searchable (discoverable)
* durable
* taggable
* accurate
* deliver content formats seamlessly
* fresh and refreshed information
* update notifications to doc owner
* handle communications of completed RTB work

# Progress report

In our kickoff meeting, we defined the initial content and platform criteria to be tried out by a single test case, the Campaign Manager. Our initial inquiries are:

* What information do we share with our customers today and how fully can this inform the architecture of the knowledge base. With CM today, we can:
  + Provide a platform for release notes, videos, and user guides.
  + Design a process to populate it with the right content.
* Look at the CM GitHub web page for design and content delivered.

# Next step

The next step is to identify and define requirements to tailor the platform and file structure for Marketing and Sales searchability and use. The end result of our initial proposal includes:

1. Content Architecture with a [platform v capabilities](https://docs.google.com/spreadsheets/d/1A9uZJ0m16yQ4NPRPpY64MrGWBE6R1A8gwg2bzjnnXfQ/edit?usp=sharing) matrix
2. [Platform governance](https://docs.google.com/document/d/1w8TVUU67TfHMxLDI_qremSrS3mlLDekf2fqLLxXKRQw/edit?usp=sharing) and evaluation

REFERENCES

[Knowledge Management Implementation in a Library, Mapping tools and technologies to phases of the KM cycle](http://web.simmons.edu/~agarwal/files/Agarwal-Islam-2014-VINE-km-tools-author.pdf), 2014, Graduate School of Library and Information Science, Simmons College, Boston, MA; School of Knowledge Science, Japan Advanced Institute of Science and Technology, Ishikawa, JA

[Searching the Enterprise](https://drive.google.com/file/d/1MY17EHBbCEESkHNi9E8q1fXk3VNCelWE/view), 2017, Now: Essense of Knowledge Publishers

NOTES on CQL

I [posted a question to Atlassian](https://community.atlassian.com/t5/Confluence-questions/Is-there-a-Atlassian-Macro-that-checks-for-and-flags-possibly/qaq-p/1200570) (and [a second Community question](https://community.atlassian.com/t5/Confluence-questions/Is-there-anything-like-JQL-for-Confluence-when-writing-scripts/qaq-p/1201485#M157286)) Community about their doc date tracking solution.  
In 2016, Atlassian said they were not planning to deal with it. Maybe they are now that this has a lot of industry attention?

Possible code solution starting points in Confluence:

* how to [add custom HTML code in the “dead section](https://community.atlassian.com/t5/Confluence-questions/How-to-make-Notify-Watchers-in-Edit-page-mode-to-be-unchecked-by/qaq-p/406225)” <what is the dead section?
* See if there is a macro or add a cron job to monitor how refreshed Confluence pages are.   
  - This is a link to [Confluence Support on statistics](https://confluence.atlassian.com/confkb/how-do-i-get-more-statistics-from-confluence-154239308.html)   
  - Maybe we can use this public marketplace solution [**User Manual**](https://www.midori-global.com/products/better-content-archiving-for-confluence/server/documentation/) as guidance to frame our conversation?
* [Current date macro in confluence?](https://community.atlassian.com/t5/Confluence-questions/Current-date-macro-in-confluence/qaq-p/239187)
* [User Macro to Search for Old Pages](https://community.atlassian.com/t5/Confluence-questions/User-Macro-to-Search-for-Old-Pages/qaq-p/609166) accepted Q&A page

See **CQL query** to find the pages based on parameters like creator, last modified etc.

The KB sites

<https://wiki.intuit.com/display/CTTest>

See refer below:

* Advanced Searching using CQL  
  <https://developer.atlassian.com/server/confluence/advanced-searching-using-cql/>
* <https://developer.atlassian.com/server/confluence/performing-text-searches-using-cql/>

Related info on the Jira side re: JQL

* JQL Advanced searching - [Fields Reference](https://confluence.atlassian.com/jirasoftwareserver0713/advanced-searching-fields-reference-965542859.html)
* JQL Advanced Searching - [Operators Reference](https://confluence.atlassian.com/jira064/advanced-searching-operators-reference-720416668.html)
* JQL Advanced Searching - [Functions](https://confluence.atlassian.com/jira064/advanced-searching-functions-720416734.html#AdvancedSearchingFunctions-ListofFunctions)