

Our experience in using Atlassian products:

Confluence tips

“If it’s not written down, it does not exist.” This piece of wisdom belongs to an established software engineer, Philippe Kruchten, and as someone dealing in the software development industry, we get that. The consequences of a poorly documented project are devastating: you put an extra strain on a team, you waste time exploring the product, and you can’t agree on anything, inevitably contributing to more revisions and increasing the project cost.

While everybody already knows all of that, it’s important to keep in mind *how* we do it. Documenting shouldn’t feel like a burden or a chore. With [Confluence](#), it’s easy: you have a familiar toolbar, logically structured and visually appealing templates, plenty of screen room, responsiveness, tons of macros, among other countless benefits.

And it’s not only about documenting software projects. For [Redwerk](#), Confluence is a multifaceted solution allowing us to:

- Have a clear understanding of every single workflow across departments
- Stay fully informed and have confidence that we can easily find all the data we need
- Onboard and impress newcomers with well-aligned processes
- Have a free mind and the ability to focus on what’s urgent and matters right now
- Share our wins and plans for the future
- Engage employees in developing our corporate culture

We’ve used Confluence almost since the very start of our operations, which is some [16](#) years ago. This journey was nothing but pleasure, so we’d like to share our go-to [Confluence features](#) and how we customized them to our needs. You can find our Jira tips for midsize services agencies [here](#). Let’s dive right in!

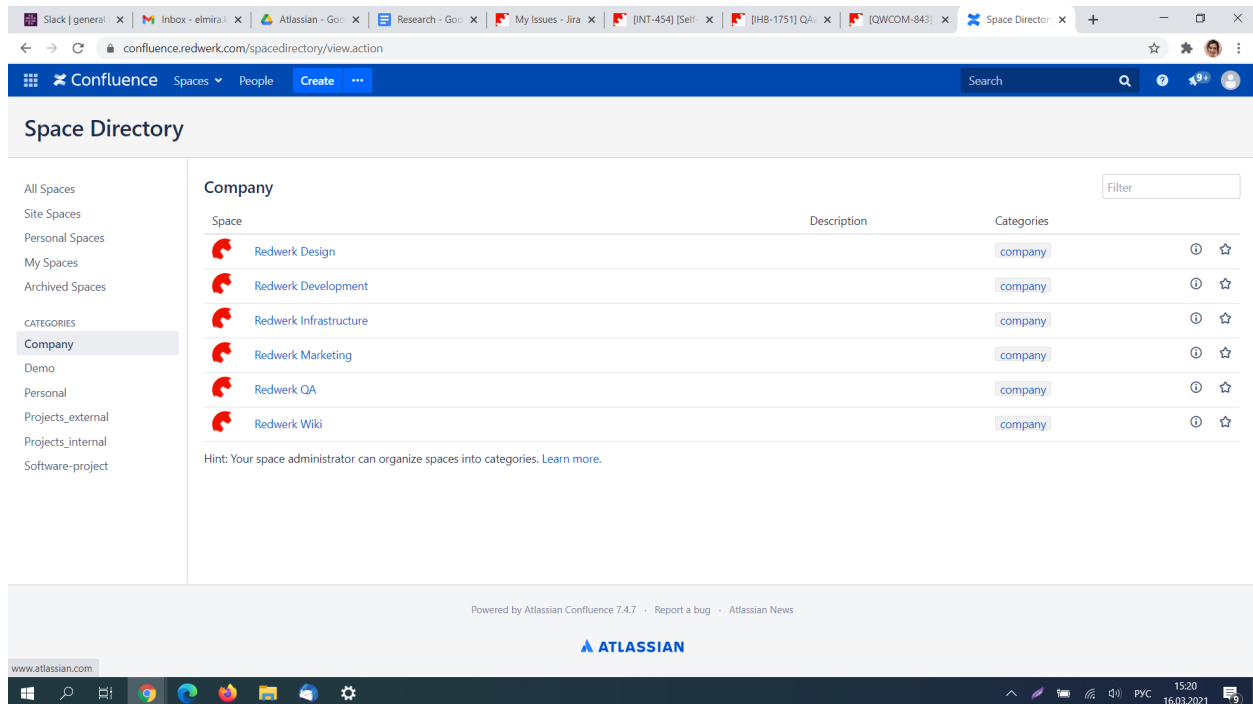
Spaces for simple data categorization

We all strive to keep our files in order so that when a moment comes to retrieve some vital information, we know exactly where it is located. With [Confluence Spaces](#), you don’t have to be a perfectionist or a control freak to easily navigate through your documentation.

As a midsize agency with about [70 professionals](#) on board, we also believe in simplifying things rather than overcomplicating them; therefore, we grouped all of our written records into the following Space Categories:

- Company (spaces for each department + Redwerk Wiki for fast employee onboarding)
- Demo (drafts for workflows that are being tested and not yet finalized or approved)
- Personal (individual employee spaces with open or restricted access)

- Projects_external (all project essentials like estimates, road maps, meeting notes, status reports on client projects)
- Projects_internal (all project essentials on our own products)



Once again, the names of these Space Categories are pretty straightforward, so even if someone is not using Confluence daily, they'll be able to get to the needed information in no time.

Macros for informative and visual content

For a software development agency, thorough documentation is key to avoiding any requirements misunderstanding and costly revisions. To be on the safe side, we document and communicate a lot. However, it doesn't suffice to simply put all that data out there. For people to actually pay attention and read, each document must be digestible, with a proper layout and a decent visual appeal. The latter can be easily achieved with [Confluence macros](#); the list is so extensive, we haven't even tried them all.

The macros we use regularly are:

- [Task Report](#) to outline action points with an assigned person and a due date
- [Info, Tip, Note, and Warning](#) to mark the current status of each project in monthly delivery reports
- [Jira Chart Macro](#) to organize and present data in a neat way
- [Profile Picture](#) to make project contributors known by face

- [Code Block](#) for software development tutorials
- [Attachments](#) to store all the project files in one place
- [PDF](#) to display any extra client materials in the requirements section
- [Favorite Pages](#) for individual contributors to easily access the liked pages
- [Gallery](#) for our rewards & recognition digests by the HR team
- [Widget Connector](#) to embed videos from our [YouTube channel](#) into monthly HR reports
- And several more

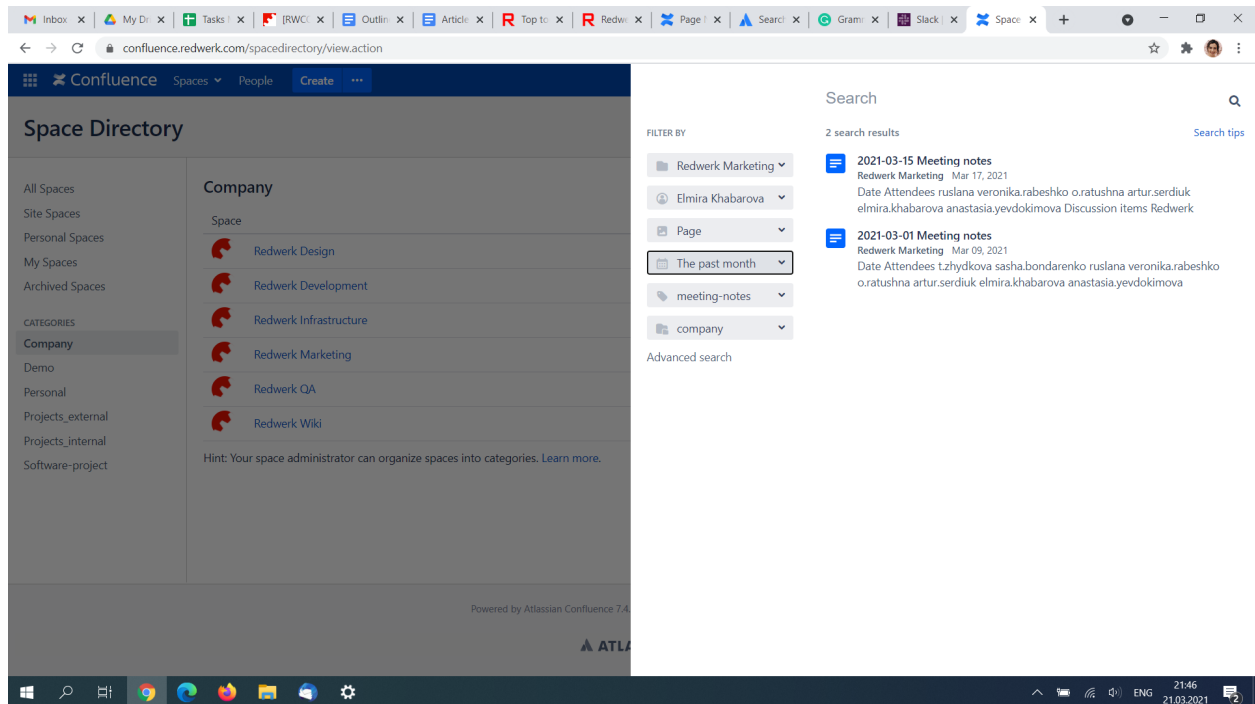
Dashboards for tracking minor tasks

While Jira Dashboards are great for monitoring one's workload and prioritizing urgent issues, you don't want to overstuff it with minor tasks like talking to someone, sending a report before the end of the month, or reminding the client about the payment. You may also have an out-of-the-blue idea and need to write it down somewhere before you have time to give it a proper thought. These kinds of tasks are best handled in a Confluence personal space, which can be easily transformed into an individual dashboard.

We like to keep it simple; besides, overplanning to resolve a small task would entirely defeat its purpose. Our project managers usually create separate sections for each project they oversee, and within those sections - task lists assigned either to themselves or people they supervise with a deadline. There is nothing more satisfying than marking the checkboxes when those tasks get done.

Labels for relevant search results

While Confluence [Search](#) is pretty advanced by itself, it can be fine-tuned even further with [Labels](#). One of our most popular labels is "meeting notes". Although our workflows differ across departments, one thing we have in common is, of course, weekly meetings. We assume you have also encountered a situation when you urgently need a piece of information and you know for sure it was mentioned in one of the Meeting Notes. With Labels, our search results get super refined, which eases the lives of our project managers who document and contribute different types of content daily. Therefore, they don't need to sift through large amounts of files since Labels narrow down the displayed results to a great extent.



Summing up

The years of using Confluence as our primary documentation tool have proven its use cases are indeed diverse and flexible. For Redwerk, it's been and still is a staple product, all because of its simplistic design, the abundance of handy features, continuous upgrades, and seamless [integration with Jira](#). As an agile service agency, we are accountable for smooth [project delivery](#), and the Jira & Confluence combo has successfully accommodated that need.