



Workflows for Confluence

Customer Story

rainfocus

Improving content quality,
strengthening compliance
and eliminating hours of
manual work.



AppFox

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RainFocus, a top event marketing platform, turned to Workflows for Confluence to streamline content reviews and enforce vital quality standards.

Gaining “superpower” control over their documentation, they're now estimated to be saving time and resource costs spent on manual quality control by up to 20% per year*.

**estimates are based on statistics produced by McKinsey Global Institute and Salary.com.*

Customer overview

At a glance

RainFocus, an event-marketing platform, was finding it increasingly difficult to maintain content quality using manual processes in Confluence.

With a growing volume of high-impact, client-facing documentation, the company needed a tool to embed automated and scalable review, approval and publishing processes.

The solution? **Workflows for Confluence**.

Read on to discover how RainFocus slashed hours of manual processing, improved content quality, and enhanced governance across teams, with just one app.

Customer profile

Founded in 2013 and headquartered in Lehi, Utah, [RainFocus](#) is a next-generation event marketing platform helping support leading Fortune 1000 companies in managing hundreds of events of all types and sizes.

With a platform designed to simplify event registration, content management, and exhibitor activation, in order to personalize attendee experiences and drive meaningful business outcomes, RainFocus captures and analyzes unprecedented volumes of first-party data.

Industry: Software / SaaS

Founded: 2013

HQ: Utah, USA

Team profile: Quality assurance

Use case: Scale quality assurance and compliance for client-facing documentation stored in Confluence

rainfocus

The Challenge

With over six years of experience using Confluence, the RainFocus teams were no stranger to the platform. But as they began using Confluence as a centralized hub for managing documentation – from internal HR policies, to public-facing help content – and they encountered the following challenges within their critical processes.



Lack of visibility across content status, review progress and overall document quality.



Manual permissions management was becoming a burden on teams.



Inconsistent writing abilities and formatting standards were difficult to manage, with multiple contributors from different departments.

RainFocus needed a way to enforce quality, consistency, and governance across all content, whether for HR, Security, or Customer Support, without introducing an unmanageable manual task load.

According to AIIM, **62% of organizations say poor information management causes delays and errors in decision-making.**

McKinsey, meanwhile, estimates that employees spend **19% of their time (nearly a full day per week) searching for and gathering information.** Structured content workflows like those enabled by Workflows for Confluence directly reduce these inefficiencies.






The Solution

[Workflows for Confluence](#) was introduced to RainFocus by their newly hired Product Documentation Manager, who had worked with Confluence for over 15 years, and had prior experience implementing documentation management workflows and processes.

They quickly recognized that Workflows for Confluence was the ideal solution to automate and manage review processes at scale in Confluence.

“ We wanted to have contributors from all across the company, and use Workflows for Confluence as a way to both track where content was, and keep the quality high. ”

With [Workflows for Confluence](#) the RainFocus team was able to:

-  **Tailor custom workflows** to each team's documentation process, using the easy no-code, drag-and-drop workflow builder.
-  **Identify content types at a glance** through automated status labelling and template tagging, saving time and manual processing.
-  **Ensure only authorized users could change content** after final review, using permission automation.
-  **Add a layer of governance** and peace of mind to the entire document lifecycle.
-  **Reduce context-switching** and maintain centralised document management with the easy Confluence integration. No more relying on email or chat tools.

As a result, Workflows for Confluence became a central part of RainFocus's documentation operations, acting as a quality gate and time-saving tool rolled into one.

The Result

RainFocus were able to:



Automate Processes.

Eliminated manual tasks, saving time on content management.



Strengthen Compliance.

Increased visibility over content to meet regulatory standards.



Simplify Review Processes.

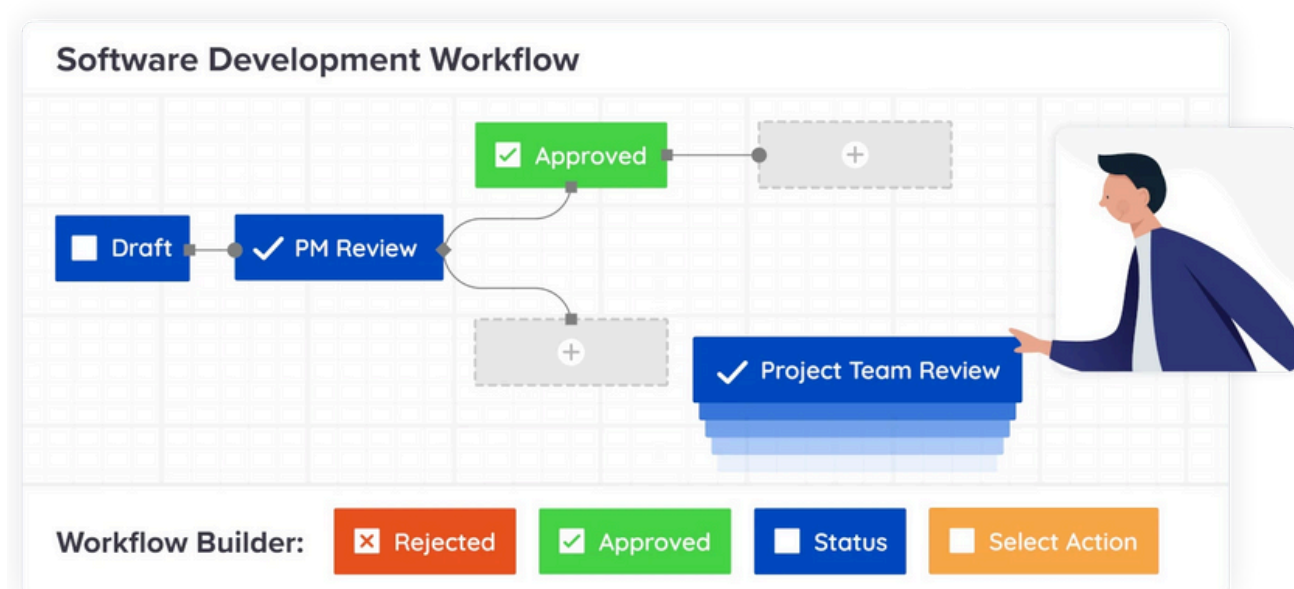
Enabled quicker reviews and faster content delivery.



Standardize Content.

Aligned writing and formatting across departments for consistency.

“Put simply, it's just a great tool that can do lots of things to enhance documentation quality and control.”

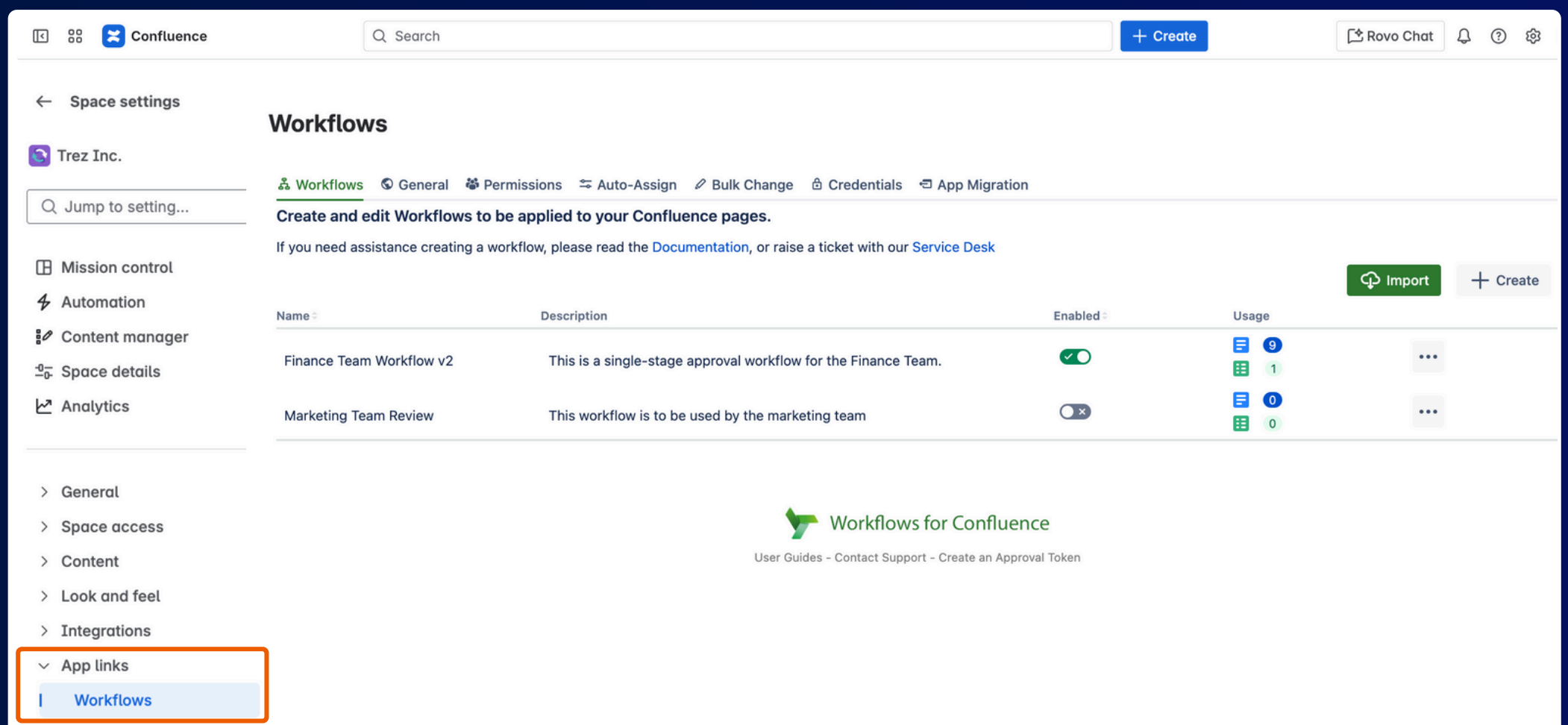


6 ways to make Workflows for Confluence do the work for you

[Workflows for Confluence](#) was built with the user in mind. Set up the same streamlined content review, approval, and publishing framework implemented by RainFocus, using the no-code workflow builder and low-code CQL functions for an instantly accessible solution to scaling content governance in Confluence.

Install and open and the app

1. Install Workflows for Confluence from the [Atlassian Marketplace](#).
2. As a space or Confluence admin, access the workflow builder via:
 - Global: Global Settings → Workflows
 - Space-level: Space Settings → App links → Workflows

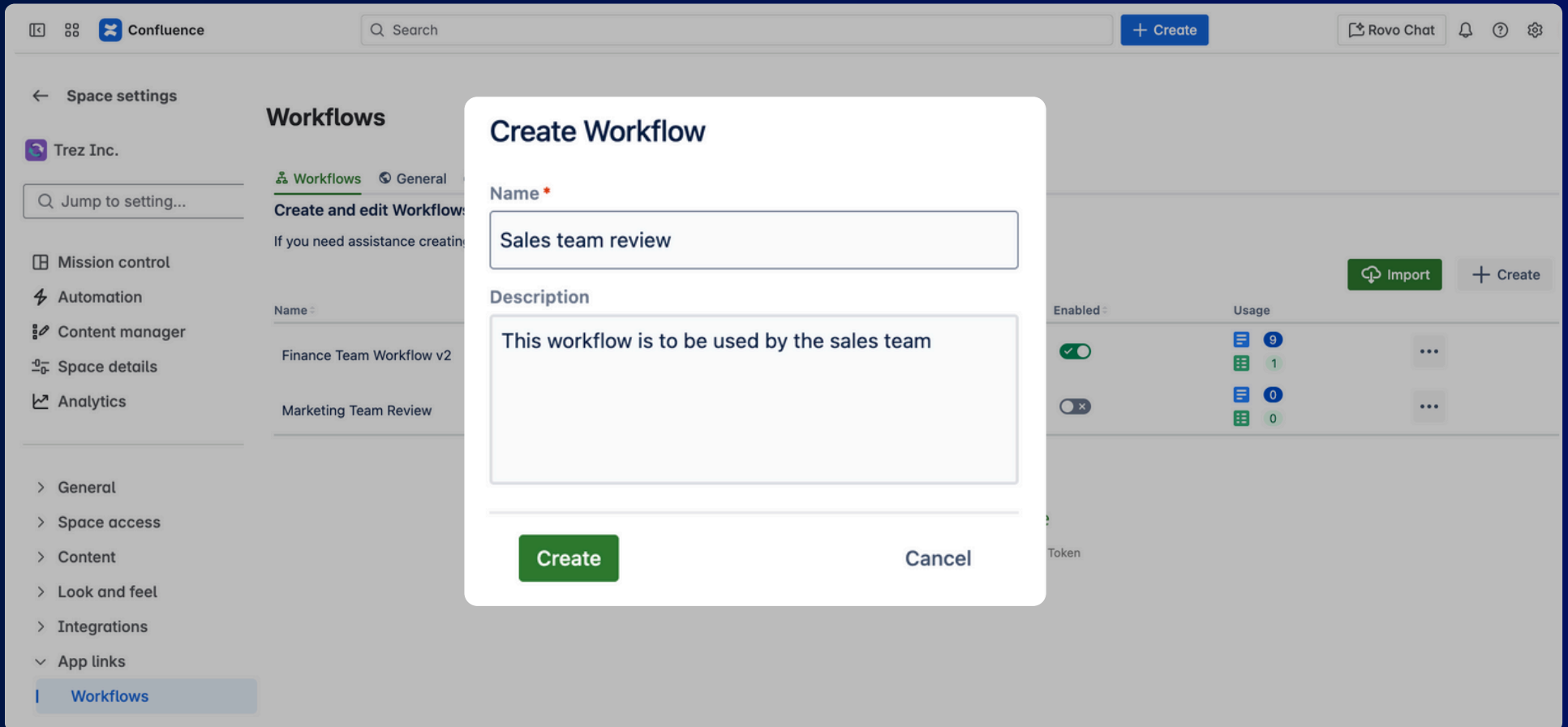


The screenshot shows the Confluence interface for a space named 'Trez Inc.'. The left sidebar contains a 'Space settings' menu with options like Mission control, Automation, Content manager, Space details, Analytics, and App links. The 'App links' section is highlighted with an orange box, and 'Workflows' is selected within it. The main content area displays the 'Workflows' section, which includes a search bar, a 'Jump to setting...' dropdown, and a table of existing workflows. The table has columns for Name, Description, Enabled status, and Usage. Two workflows are listed: 'Finance Team Workflow v2' (enabled) and 'Marketing Team Review' (disabled). At the bottom of the page, there is a logo for 'Workflows for Confluence' and links to User Guides, Contact Support, and Create an Approval Token.

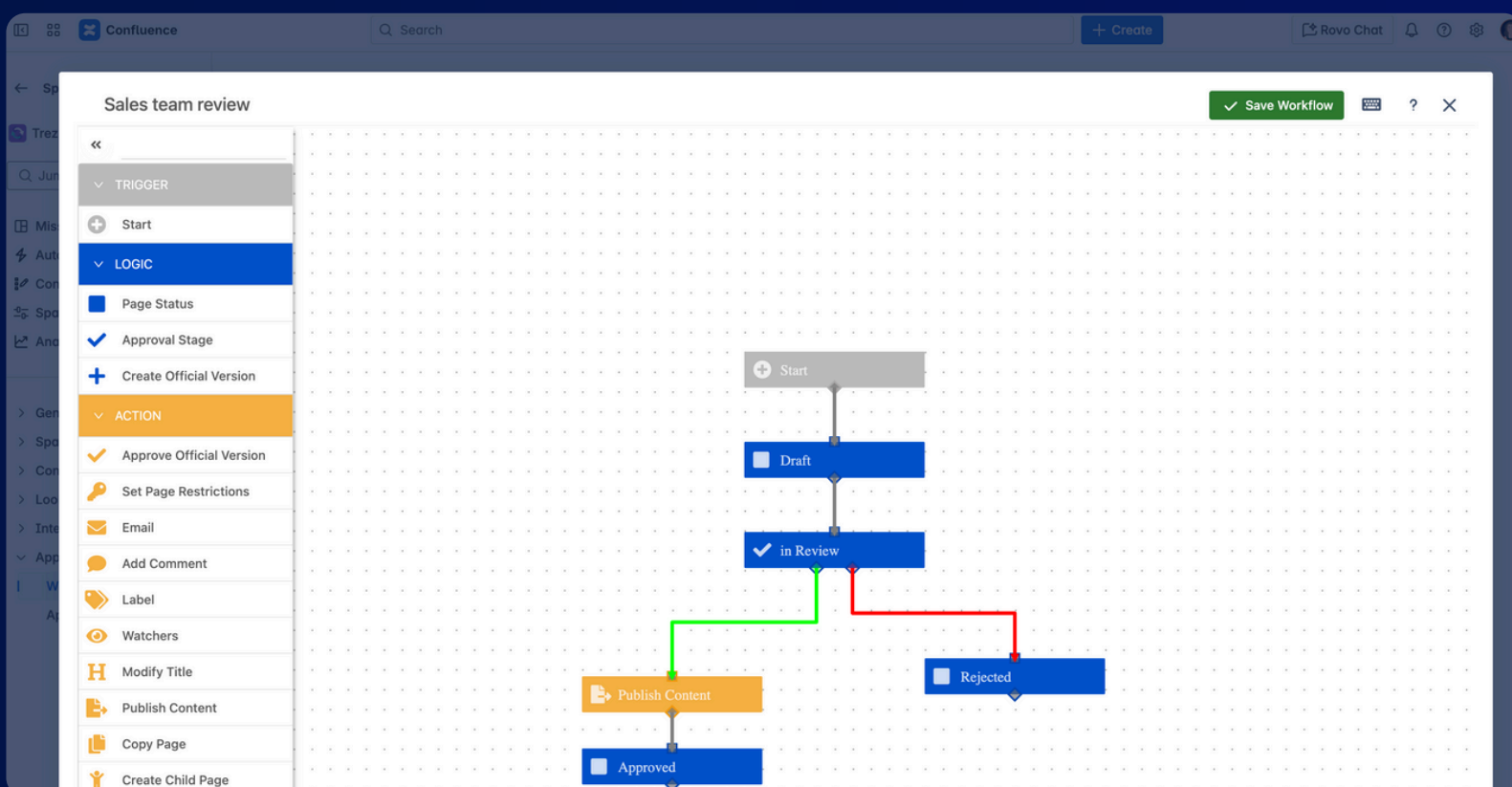
Name	Description	Enabled	Usage
Finance Team Workflow v2	This is a single-stage approval workflow for the Finance Team.	✓	9
Marketing Team Review	This workflow is to be used by the marketing team	✗	0

Create your Custom Workflow

1. Click **Create** in the Workflows table.
2. Name your workflow (e.g., “Content Review & Publish”) and add a description.



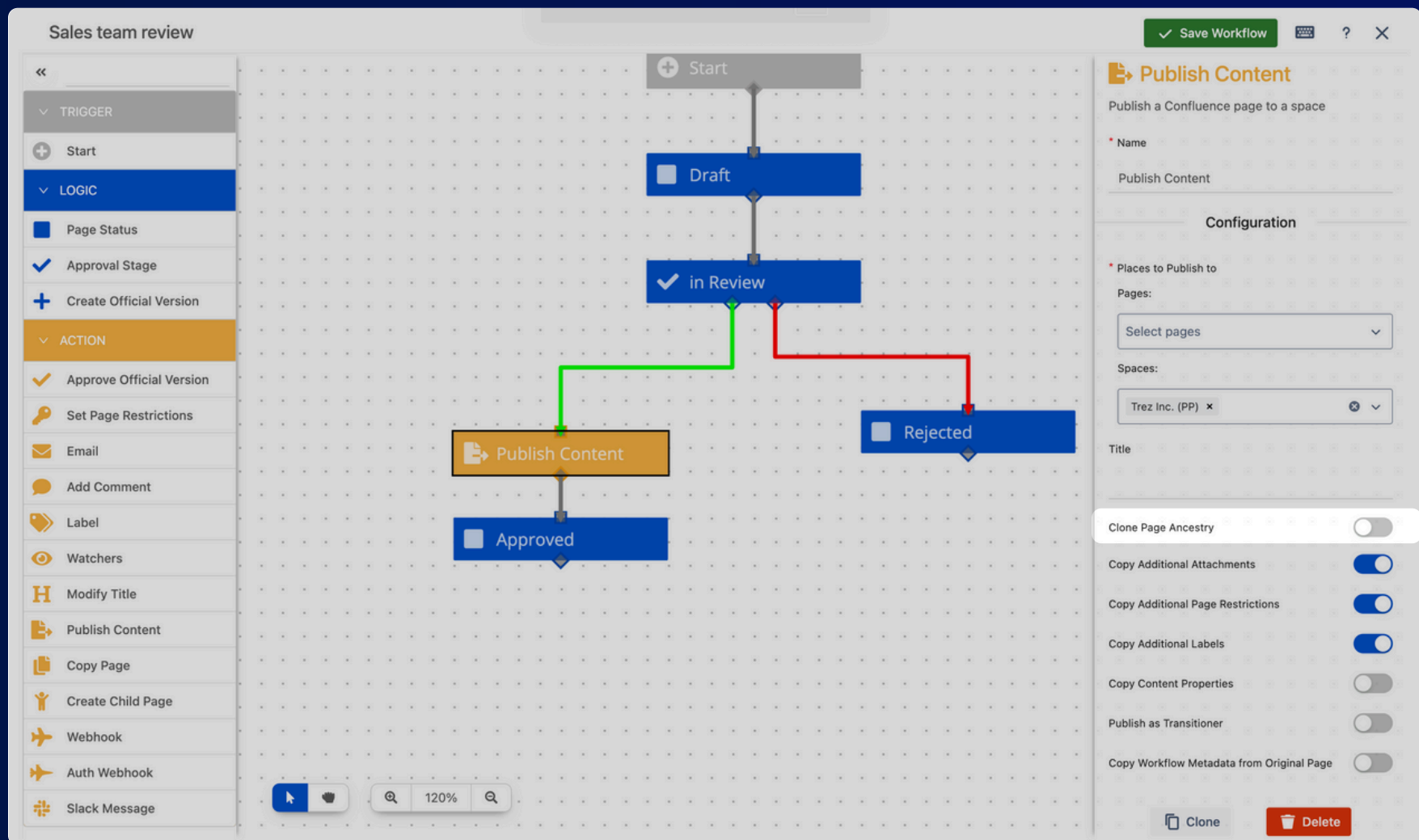
3. Drag a **Start** step to the canvas.
4. Add and rename **status** steps (e.g., Draft, Under Review, Approved).
5. Configure approvals: select who must sign off at each stage and whether e-signatures are required.
6. Draw connectors between statuses to control allowed transitions.
7. **Save** the workflow.



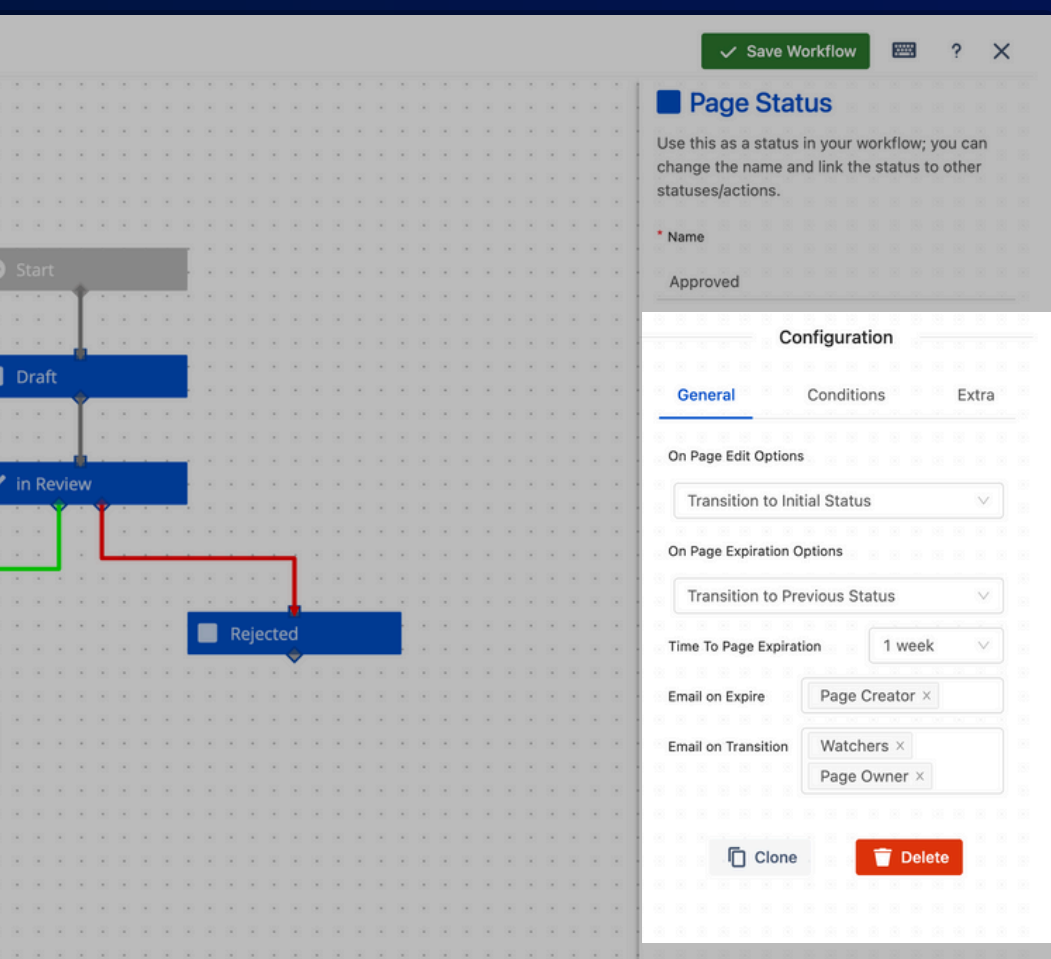
1. Enable Publishing Controls

Add a **Publish** action in the "Approved" status branch to automatically publish public-facing pages from your private draft space to a live space only once they've been approved.

- Configure the clone ancestry option if your content lives inside folder hierarchies.



Optionally, enable an **expiry** (e.g., pages expire 30 days post-approval and re-enter Draft)



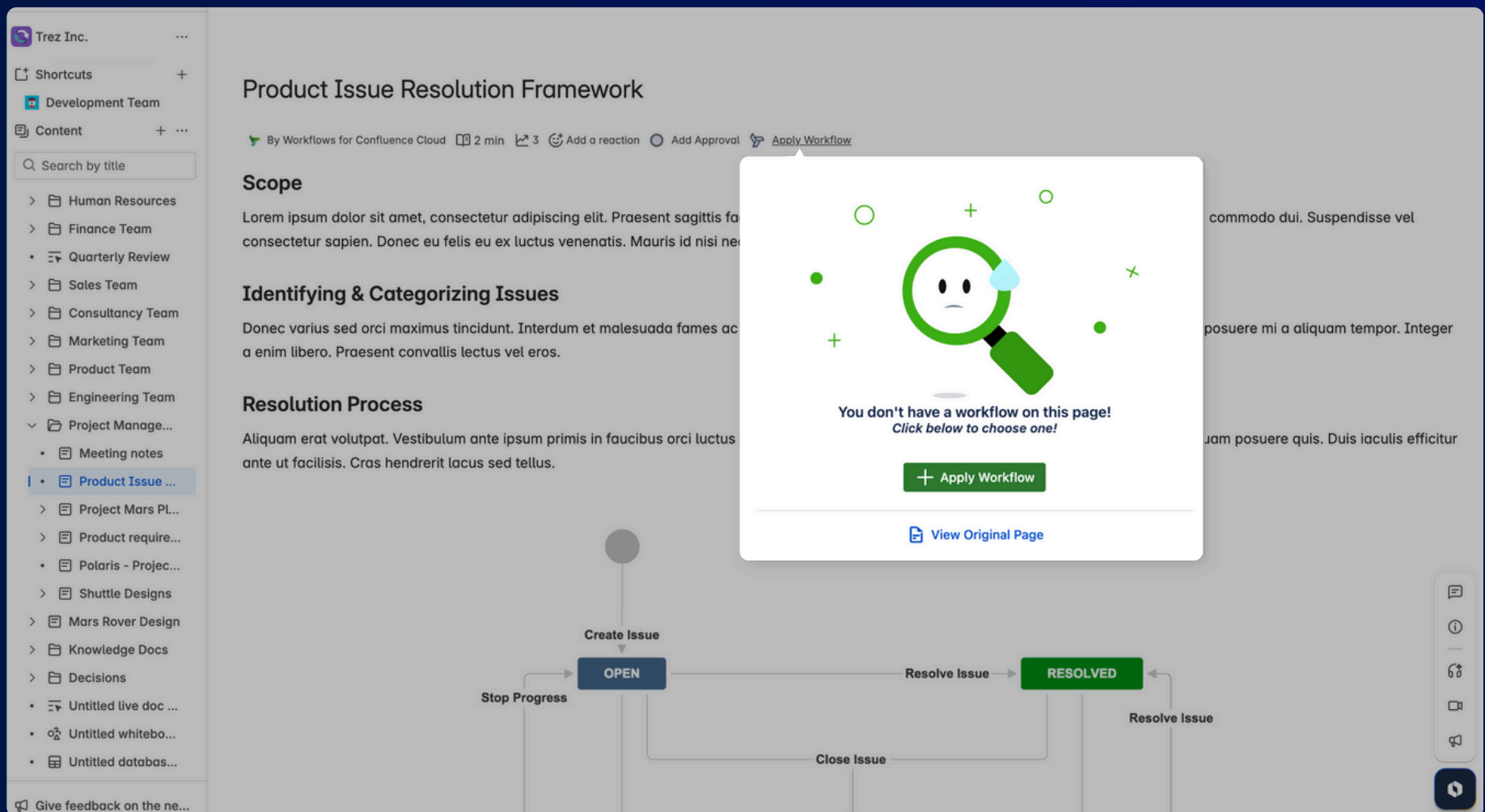
- Select the "Approved" status (or any final stage) in the Workflow Editor.
- Configure the general section:
 - Time to expiry (e.g., 1 year after approval)
 - Transition: back to "Draft" or "In Review"
 - Optional: choose who to email when the page transitions
- Save and publish the workflow.

This helps maintain quality without relying on teams to remember periodic checks.

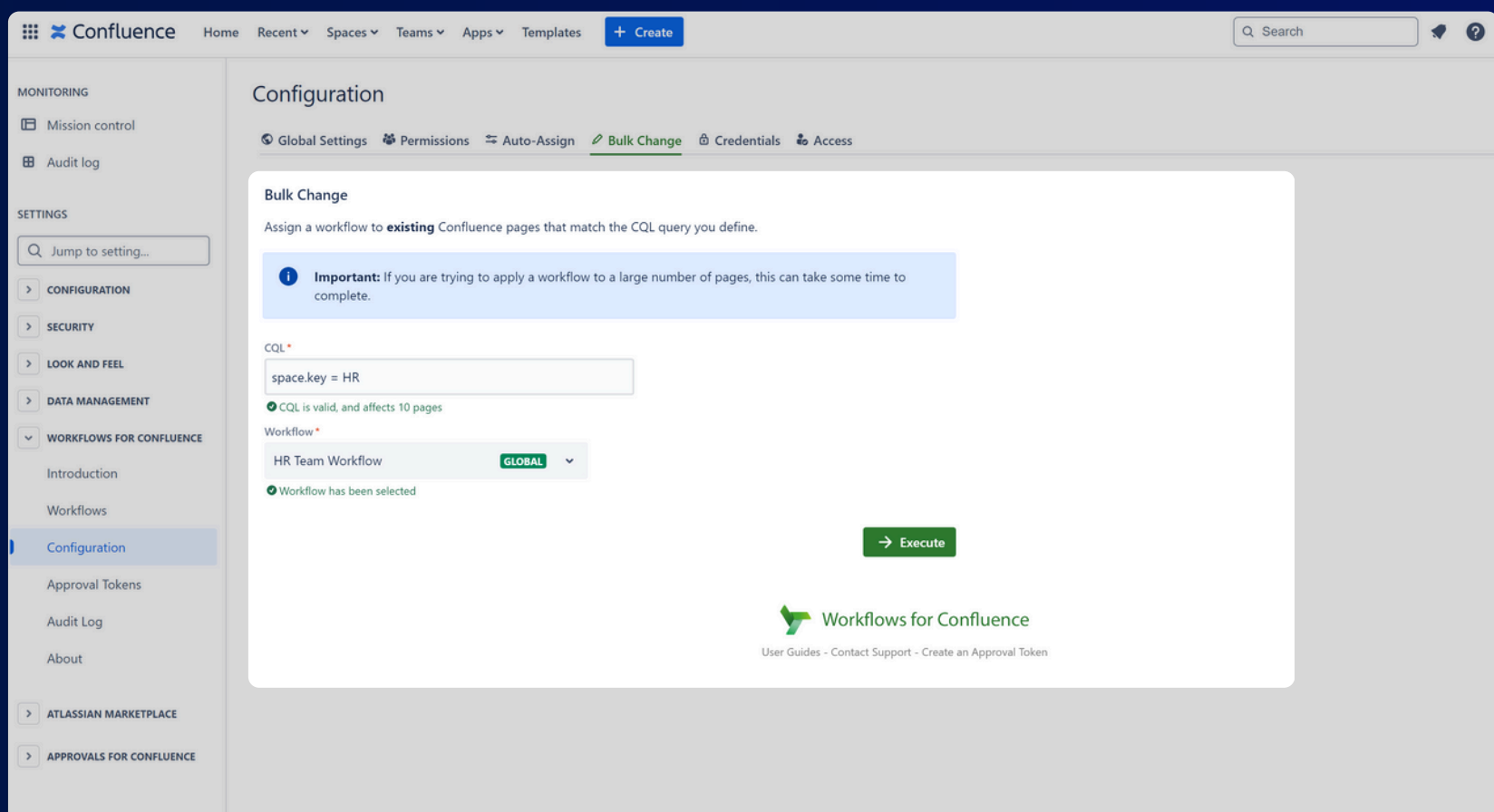
2. Customize how your workflows are applied

You now have three ways to apply it to Confluence pages:

- Manually: via the page byline on individual pages.

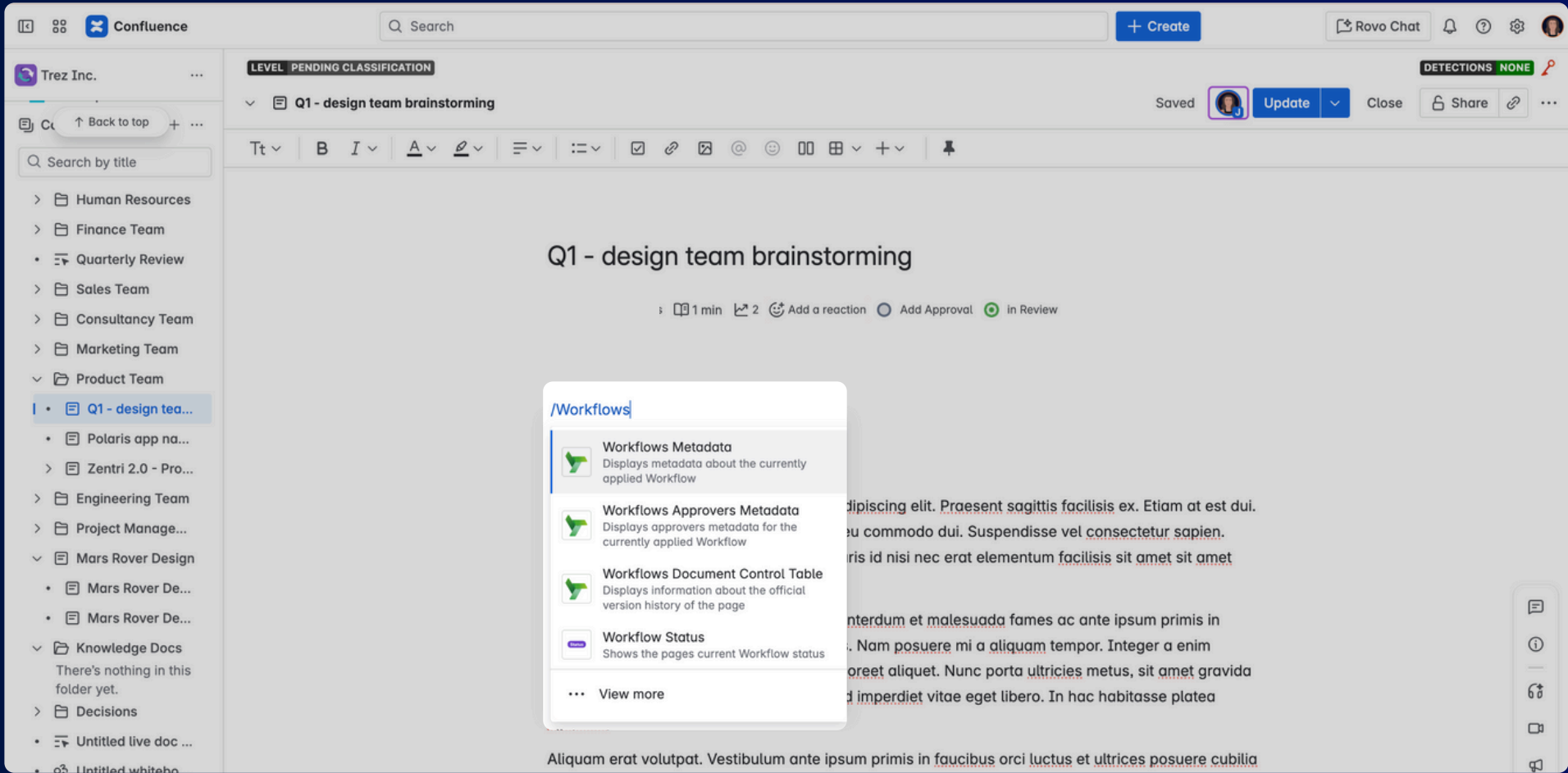


- Automatically (new): use CQL queries to assign workflows to new pages based on labels or template.
- Bulk (existing): use CQL to bulk assign the workflow to pages already in production.

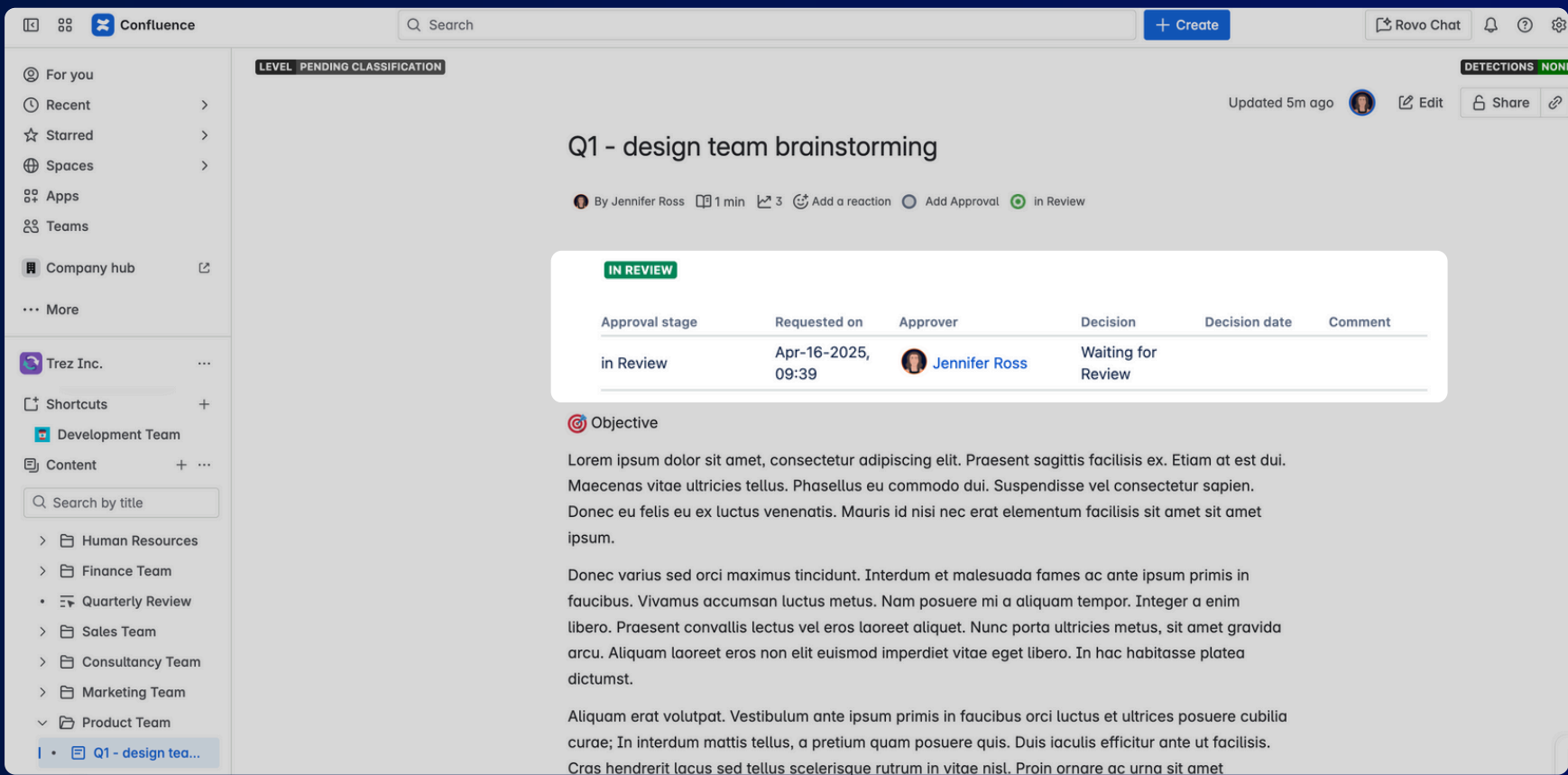


3. Embed workflows statuses into pages

- Add workflow macros, such as:
 - Metadata.
 - Approvers list.
 - Document control table.



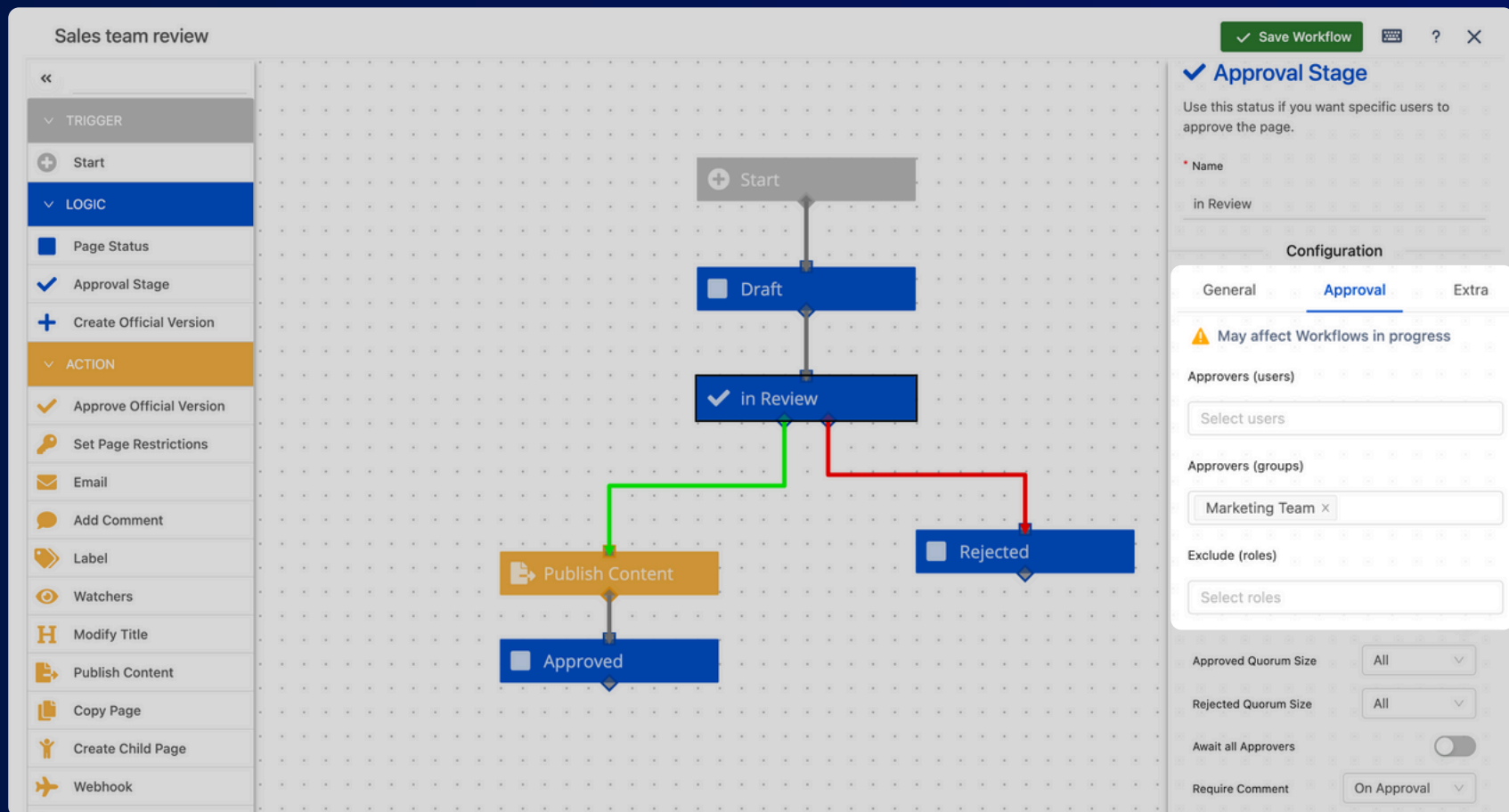
These exportable macros display real-time status, sign-off info, and metadata inline, even in page footers or inside tables.



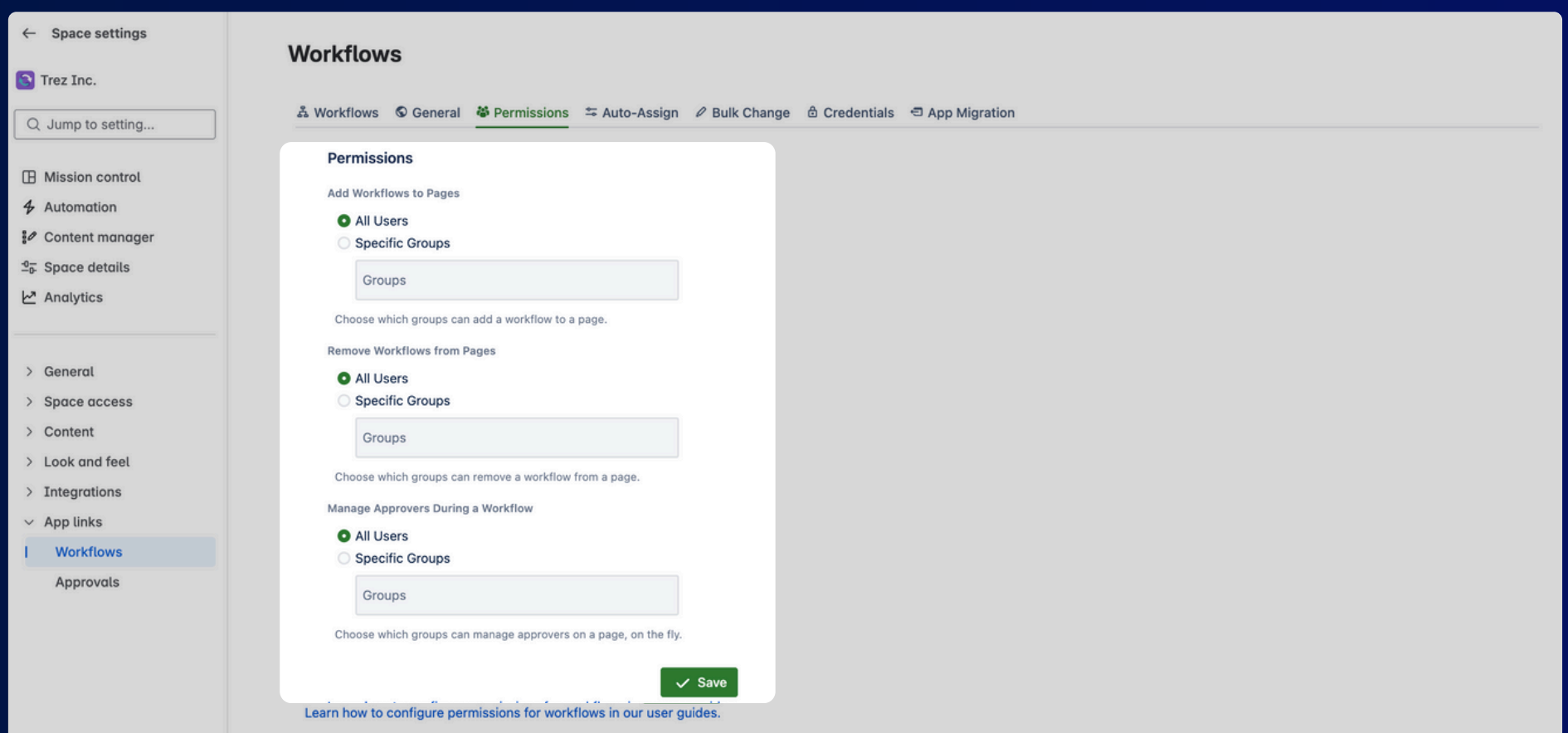
4. Control permissions automatically

- Set up each status to trigger permission changes within the workflow builder:
 - Only "reviewer" group can edit during review.
 - Once approved and published, set the page to "view only" for contributors.

This ensures content freezes after approval, preventing unauthorized edits.



Alternatively, set the specific groups that can add, remove, and manage workflows within Confluence spaces.



5. Monitor & search workflows

- Use the Workflows Search tool to see all pages by status, approver, space, etc.
- Apply filters to find the content you care about:
 - *Workflow name* – isolate specific processes (e.g., "HR Policy Review").
 - *Status* – show only pages "Under Review" or "Awaiting Approval".
 - *Approver* – see what's assigned to you or a team member.
 - *Expired or about to expire* – catch content that needs re-validation.
- Sort columns by title, status, date updated, or approval progress.
- Click on a page to jump directly to it and take action (e.g., approve, comment, reassign).

Workflows Search

Find any page in Confluence with a workflow assigned to it and easily view the current workflow status. Use the additional filters to narrow down your search.

Title	Page Version	Status	Workflow	Space	Last Transition Date
Test	5	APPROVAL STAGE	Belinda testing	Belinda Polychronakis	Jul-14-2025, 17:45
Copy of Pension Plan	1	DEV TEAM LEAD REVIEW	Simple General Workflow	SB	Jul-11-2025, 15:55
Meeting notes	4	IN REVIEW	Sales team review	PP	Jul-01-2025, 10:13
Zentri 2.0 - Product Launch Documentation	3	DRAFT	Sales team review	PP	Jun-30-2025, 21:27
190325 Demo	2	DRAFT	Official Version + Publishing Workflow	HR	Jun-16-2025, 15:44
Pension Plan	3	PAGE STATUS	Replicate Bug SD-4752	SB	Jun-05-2025, 11:08
Polaris app navigation redesign	2	DRAFT	Sales team review	PP	May-20-2025, 14:26

Filters

Workflow

HR approval process

Status

Expired

Spaces

Trez Inc. (PP)

Status Transition Date

7/22/2025

Approval Filters

Approval Status

PENDING APPROVAL FROM

Users

Users

Note: these filters only apply to Approval nodes in your workflow. [Learn more](#)

Apply Filters

The filtered result will appear instantly, allowing you to export the information to CSV.

Workflows Search

Find any page in Confluence with a workflow assigned to it and easily view the current workflow status. Use the additional filters to narrow down your search.

Title	Page Version	Status	Workflow	Space	Last Transition Date
Employee Benefits	5	PUBLIC	Restrict access for draft	HR	Jul-23-2025, 11:02
Captionizer	40	CREATE OFFICIAL VERSION	Official Version + Publishing Workflow	SB	Jul-17-2025, 11:32
Pension Plan	5	APPROVAL	Ad hoc approvers	SB	Jul-16-2025, 14:28
Meeting notes	1	APPROVAL STAGE	Basics workflow	Abby-Marie Flood	Jul-16-2025, 14:03
Meeting notes	5	APPROVAL STAGE	Belinda testing	Belinda Polychronakis	Jul-14-2025, 17:45
Captionizer	1	DEV TEAM LEAD REVIEW	Simple General Workflow	SB	Jul-11-2025, 15:55
Captionizer	4	IN REVIEW	Sales team review	PP	Jul-01-2025, 10:13

Filters

Workflow

HR approval process

Status

Expired

Spaces

Trez Inc. (PP)

Status Transition Date

7/20/2025

Approval Filters

Approval Status

PENDING APPROVAL FROM

Users

Users

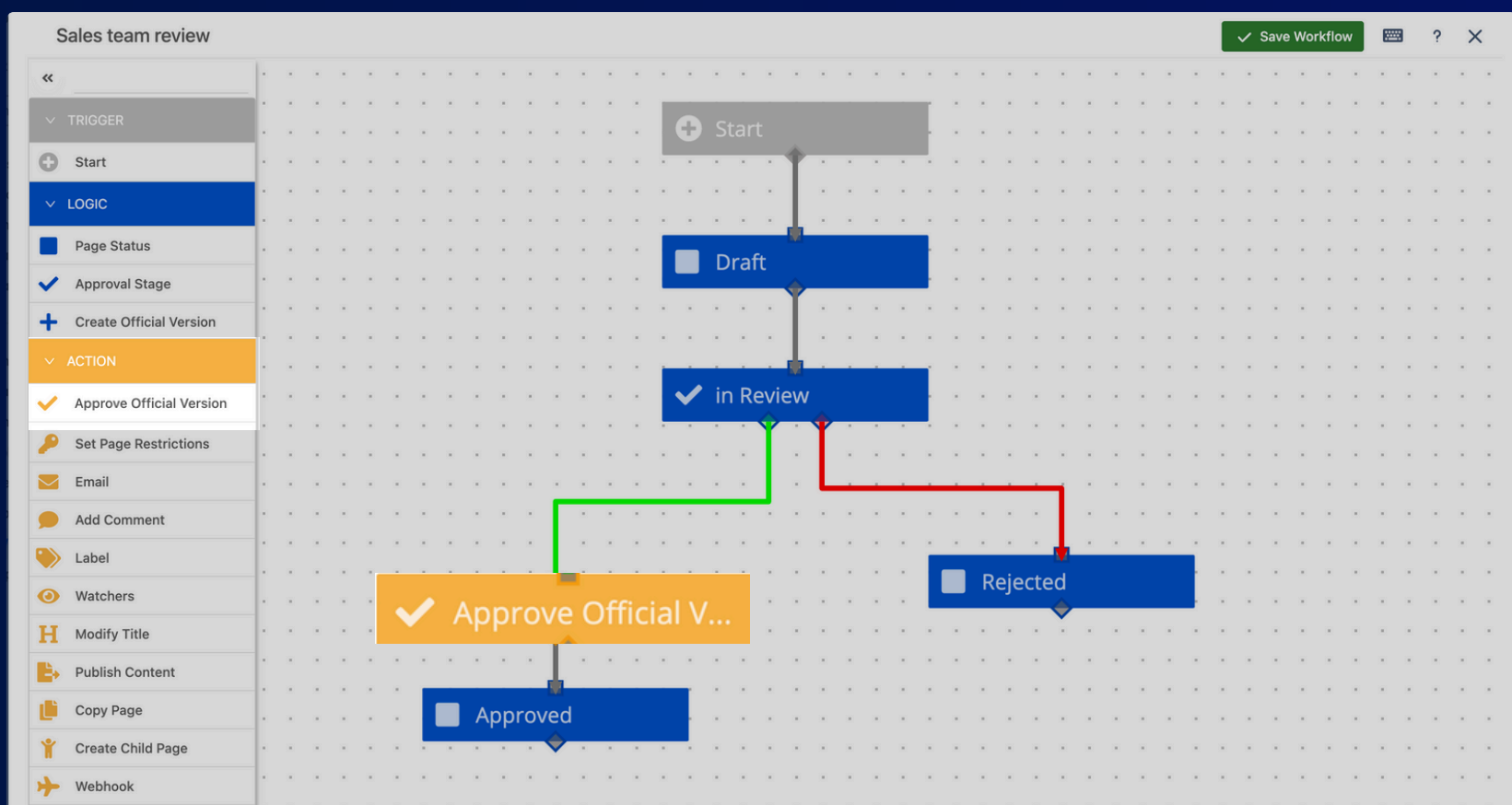
Note: these filters only apply to Approval nodes in your workflow. [Learn more](#)

Apply Filters

6. Maintain and Optimize

Use built-in audit logs, and versioning controls to stay compliant and improve processes:

- Access the Audit Log tab from the Workflow Search and filter by your desired field to export audit logs in various formats (CSV included) needed for maintaining regulatory compliance.
- Add the Official Version and Major / Minor Version action into your workflow via the Workflow Editor to keep a granular record of the changes your document has undergone throughout its lifecycle.



Take it a step further...

Combine Workflows with Confluence page templates:

1. Create a space-wide Confluence page template.
2. Embed key Workflows for Confluence macros (*status, approvals, document control*).
3. Pre-assign labels that trigger workflow assignment (*e.g., label=policy*).
4. Instruct teams to always use the template when starting new documentation.

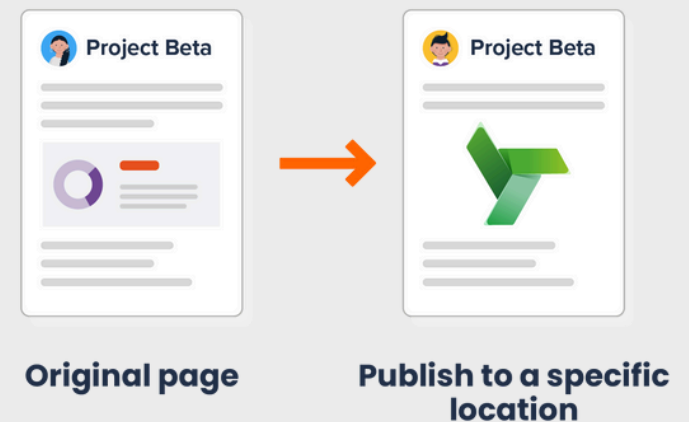
Ensure that every page:

- Gets the right workflow.
- Has review logic embedded from day one.
- Meets governance standards with minimal effort.

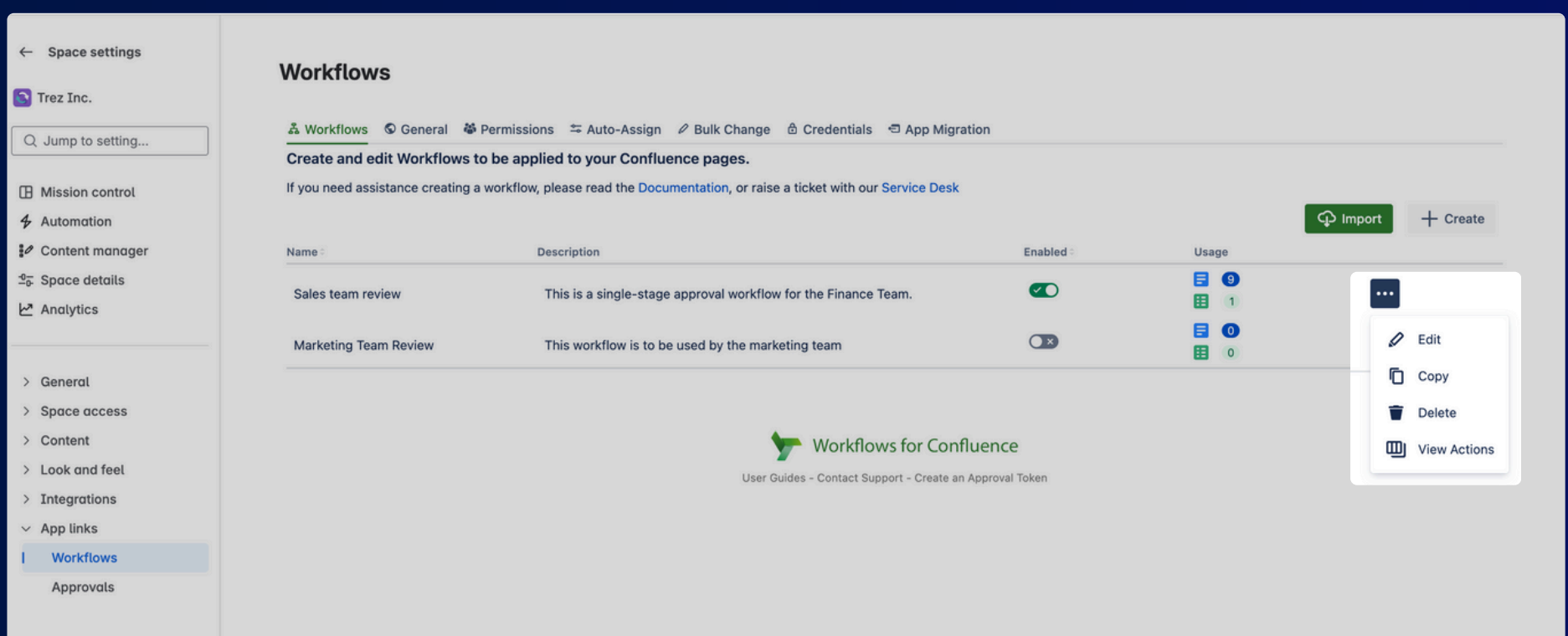
Reliable workflows that evolve with your changing needs

As your organisation grows, so will your document management needs. Update your workflows with ease, to account for:

- New approval steps
- Ownership changes.
- Lifecycle timing updates.
(e.g., shorter expiry period due to new regulations).



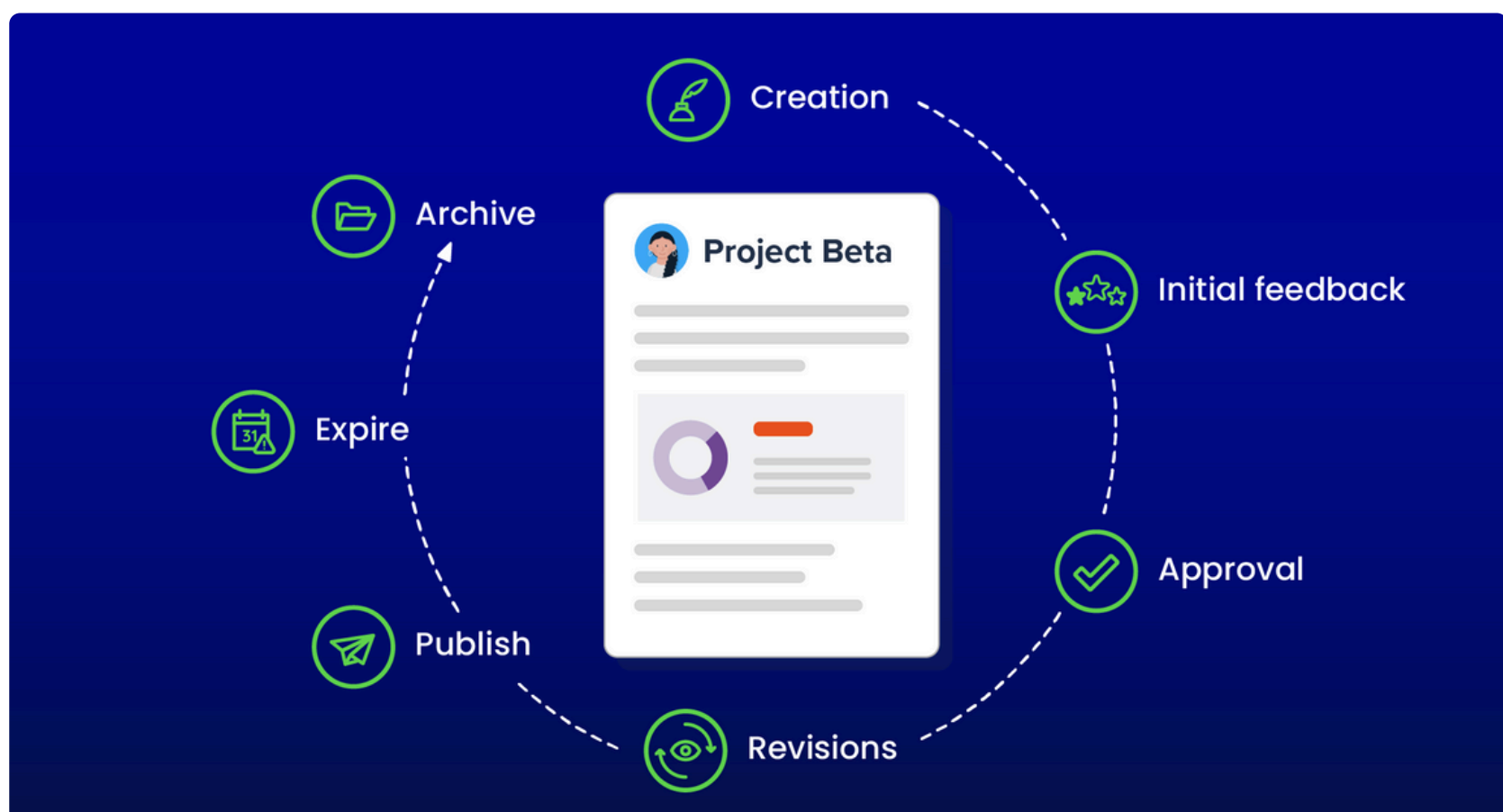
1. Edit your workflow from the Admin Panel for any changes to:
 - Status names or transitions
 - Who can approve
 - Timeout actions
 - Permission rules
 2. Click Publish – changes apply automatically to new AND existing pages using that workflow
 3. Optional: Notify affected teams via Confluence comments or page alerts
- If a change breaks a transition or macro, admins will be notified with exact error details.



[Workflows for Confluence](#) helps you control the quality of every page in your instance, at scale.

Test and validate changes safely before rolling out an update globally:

1. Apply the test version to a staging space or a single page
2. Embed key Workflows for Confluence macros (*status, approvals, document control*)
3. Run through a full workflow cycle (draft > review > approve > expiry)
4. Confirm:
 - Macros update correctly
 - Notifications reach intended users
 - Permission changes lock/unlock as expected



Ready to revolutionize the way
you use Confluence?

Find out for yourself how our superpower app can help bring order to your documentation, keep you compliant, and build customer confidence with every page you publish.

Start your free 30-day trial of [Workflows for Confluence](#) today, or [book a demo](#) with our support team to find out more.