

Migrating SharePoint Forms and Workflow to Confluence Using Coniforms



PRESENTED BY

Marquita Apodaca & Jessica Brito

Background on CAWG aka LAB

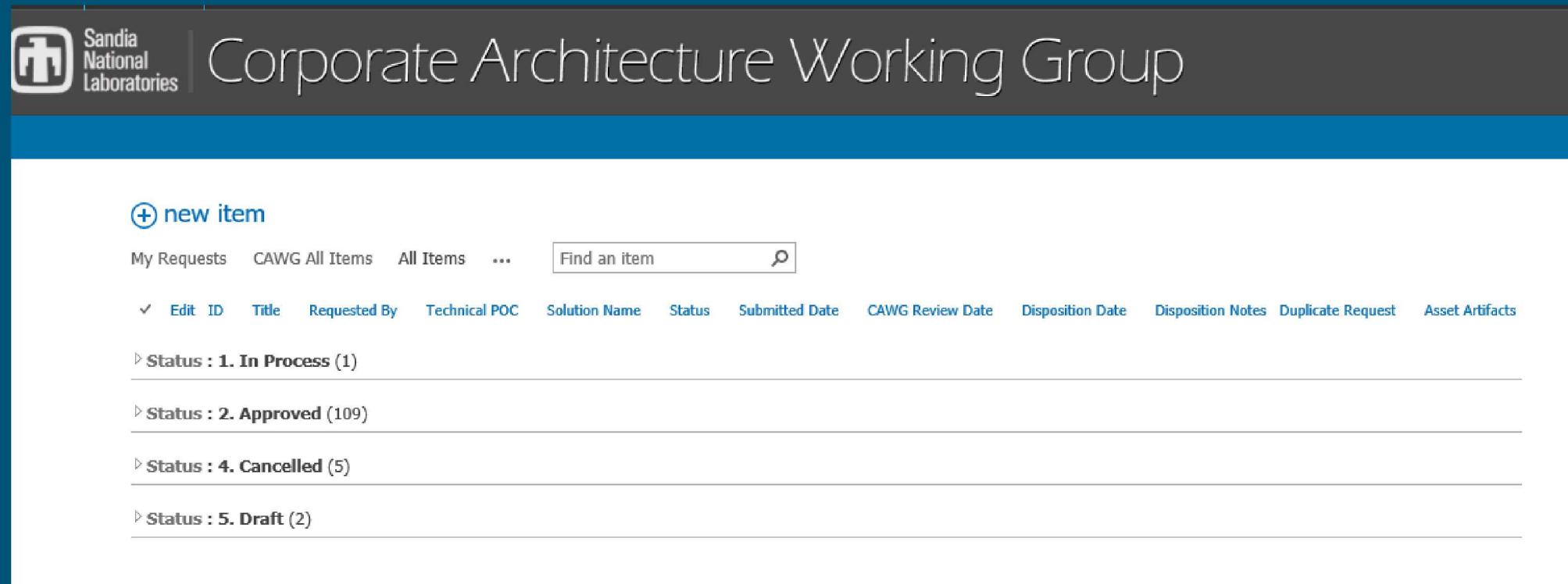
In this presentation we will show how we used different Confluence Macros in combination with the Conforms Plug in to create our LAB and RMA Confluence pages

- The LAB is charged with improving solution architecture consistency throughout Sandia and fostering best practices in solution and service design.
- The SDL Release Management Process provides a check of the Required SDL Evidence Sheet. Approval from the Release Management Authority (RMA) is required prior to deployment.

Macros used:

- Templates
- Expand feature
- Show If
- Labels
- Content by Label
- Horizontal Navigation Bar
- Pivot Table

Old LAB (formerly known as CAWG) SharePoint Site



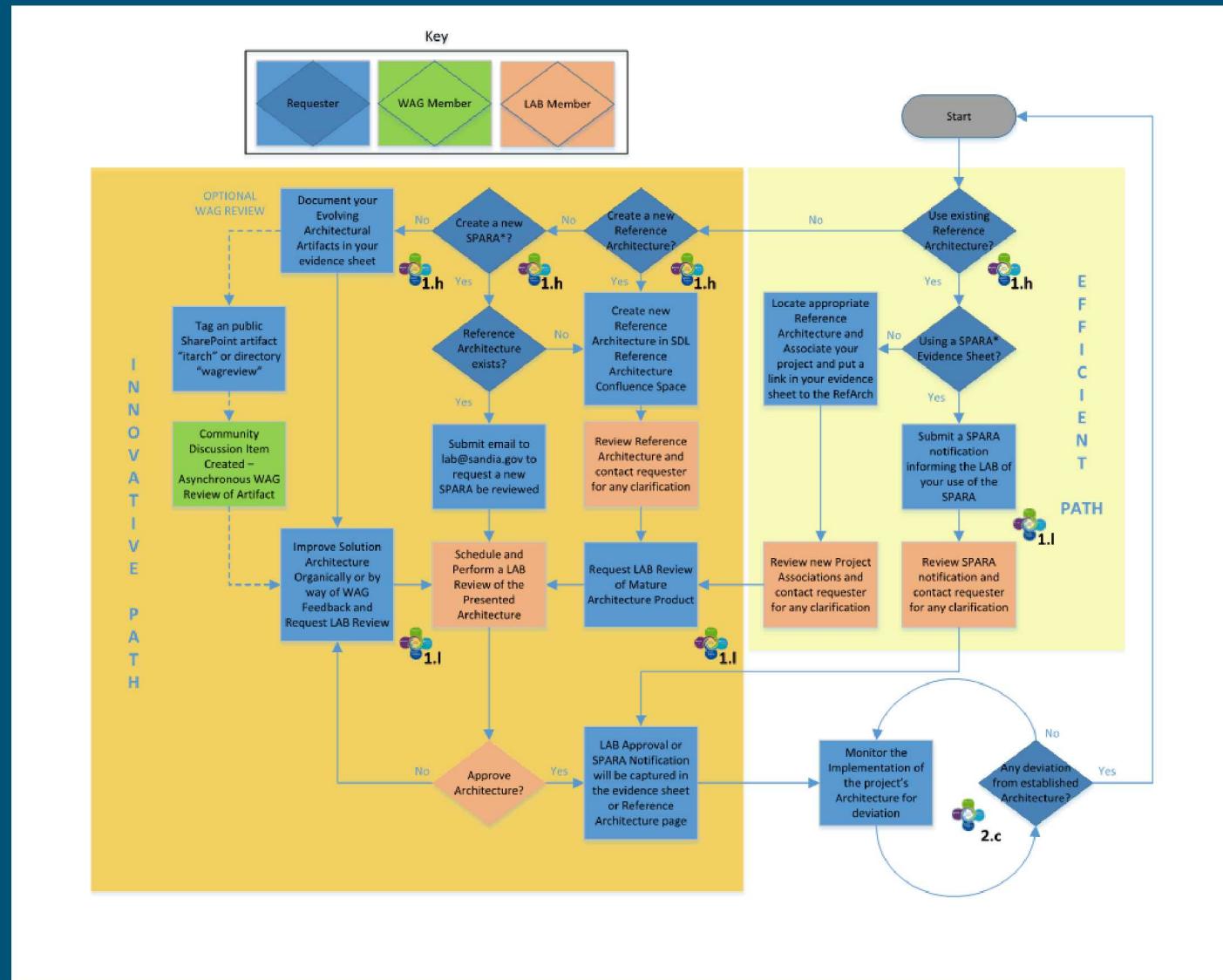
Corporate Architecture Working Group

[new item](#)

My Requests CAWG All Items All Items ... 

✓	Edit	ID	Title	Requested By	Technical POC	Solution Name	Status	Submitted Date	CAWG Review Date	Disposition Date	Disposition Notes	Duplicate Request	Asset Artifacts
▷	Status : 1. In Process	(1)											
▷	Status : 2. Approved	(109)											
▷	Status : 4. Cancelled	(5)											
▷	Status : 5. Draft	(2)											

Architecture Review Process



Laboratory Architecture Board (LAB)

- SharePoint Request

The CAWG is charged with improving solution architecture consistency throughout Sandia and fostering best practices in solution and service design.

Authorized by the Director and CIO, the CAWG:

- Serves as an impartial panel responsible for reviewing and approving project architectures as part of the Solutions Delivery Lifecycle (SDL)
- Provides input into the architecture vision for Sandia and ensures that new architectures are working towards that vision
- Identifies potential duplication of efforts, systems, or infrastructure within new and existing development efforts, and shares relevant information with leadership to determine whether a consolidation plan is required
- Offers early review of architecture artifacts from project proposals to enable consistency and cost effectiveness
- Approves and maintains reference architectures to be displayed in the Virtual Architecture Repository (VAR) and used in solution development efforts



- Confluence

Architecture Approval (1.1)

Requesting a Laboratory Architecture Board Review will populate this step and once approved, that approval will be captured here.

Click the LAB Review Request button below to start this process.

LAB Review Request

› LAB Reviews

Confluence LAB Request Page

About the LAB

The LAB is charged with improving solution architecture consistency throughout Sandia and fostering best practices in solution and service design. Authorized by the Director and CIO, the LAB:

- Serves as an impartial panel responsible for reviewing and approving project architectures as part of the Solutions Delivery Lifecycle (SDL)
- Provides input into the architecture vision for Sandia and ensures that new architectures are working towards that vision
- Identifies potential duplication of efforts, systems, or infrastructure within new and existing development efforts, and shares relevant information with leadership to determine whether a consolidation plan is required
- Offers early review of architecture artifacts from project proposals to enable consistency and cost effectiveness
- Approves and maintains reference architectures to be displayed in the Virtual Architecture Repository (VAR) and used in solution development effort



The screenshot shows a Confluence page titled 'About the LAB'. Below the title, there is a section about the LAB's responsibilities. Underneath this, there are two dropdown menus: 'Form: CAWG' and 'Form: RefArch'. At the bottom of the page is a navigation bar with links: 'My LAB Requests' (which is underlined and highlighted with a red box), 'Active LAB Requests', 'Approved LAB Requests', 'LAB Review Statistics', and 'Collection of Architectural Artifacts'. Below the navigation bar is a table with the following data:

Edit	Status	Title	Video	Disposition Notes	Requested by	Technical PoC	LAB Review Date	Disposition Date
Edit	IN PROCESS	**Do Not Delete**NLIT Presentation		Testing for NLIT Presentation	 Jessica Eulalia Brito	 Marquita Apodaca	Sep 25, 2020	Sep 28, 2020

This page shows different views of the LAB Request Data:

- A user can view only requests that they submit
- A user can view All open and active requests
- A user can view All Approved LAB requests
- A user can view metrics for all LAB requests

Horizontal Navigation Bar Macro

- We used this Confluence Macro to achieve the tab effect to toggle between different views



The screenshot shows a Confluence page titled "Horizontal Navigation Bar Page" with the subtitle "title = My LAB Requests". The page content is a "Horizontal Navigation Bar" macro. The macro displays a series of tabs and sub-tabs. The tabs are:

- Table Filter | isOR = AND | separator = Point(.) | datepattern = dd M yy | default | cell-width | lab...
- ConfiForms TableView | formName = CAWG | pageTitle = Laboratory Architecture Board (LAB) | filter = [entry._us...
- Edit Controls for ConfiForms | showBoth = false | restrictions = [entry._user]

Below the tabs, there are several sub-tabs, each preceded by a "ConfiForms Form Field" icon and a label:

- ConfiForms Form Field | fieldName = Status
- ConfiForms Form Field | fieldName = Title | overrid...
- ConfiForms Form Field | fieldName = Artifacts | ove...
- ConfiForms Form Field | fieldName = Disposition | o...
- ConfiForms Form Field | fieldName = Requester | ove...
- ConfiForms Form Field | fieldName = POCName | over...
- ConfiForms Form Field | fieldName = ReviewDate
- ConfiForms Form Field | fieldName = DispositionDate

Show button Feature Macro

My LAB Requests **Active LAB Requests** Approved LAB Requests LAB Review Statistics Collection of Architectural Artifacts

LAB Review Request Form

Show	Edit	ID	Status	Title	LAB Review Date	Disposition Date
Show		84	IN PROCESS	**Do Not Delete**NLIT Presentat	Sep 25, 2020	Sep 28, 2020
Show						
Show	Edit	84	IN PROCESS	**Do Not Delete**NLIT Presentat	Sep 25, 2020	Sep 28, 2020

Asset Artifacts
(<https://sharepoint.sandia.gov/sites/cawg/Assets/Forms/AllItems.aspx>)

LAB Review Date Sep 25, 2020 **Disposition Date** Sep 28, 2020

1. Title * **Do Not Delete**NLIT Presentation

2. Requested By Name *  Jessica Eulalia Brito

3. Technical POC Name *  Marquita Apodaca

4. Responsible IT Organization * 

5. What is the name of the new solution or standard? * NLIT

6. Describe the purpose of the new solution or standard. What does it do? * This is a test demo do not delete

7. Describe the business problem being addressed by this solution. * This is a test demo do not delete

8. What risks are identified with adopting this solution? * none

9. What risks are identified with NOT adopting this solution? * none

10. Which Solution Security Risk and Impact Level has been determined for your solution? * Low

Table Filter | isOR = AND | separator = Point (.) | datepattern = dd M yy | default | cell-width | lab...

ConfiForms TableView | formName = CAWG | pageTitle = Laboratory Architecture Board (LAB) | filter = Status:suc...

ConfiForms View Control (EntryViewer)

Edit Controls for ConfiForms | showBoth = false | restrictions = [entry._user],mapodac,jgminer,jclane

Close

The Show button displays the content of a request for easy consumption by non-administrators

Show If Macro

- This Macro allows us to give directions for users in the edit mode that will not be displayed once a page is published in Confluence

Edit Mode View

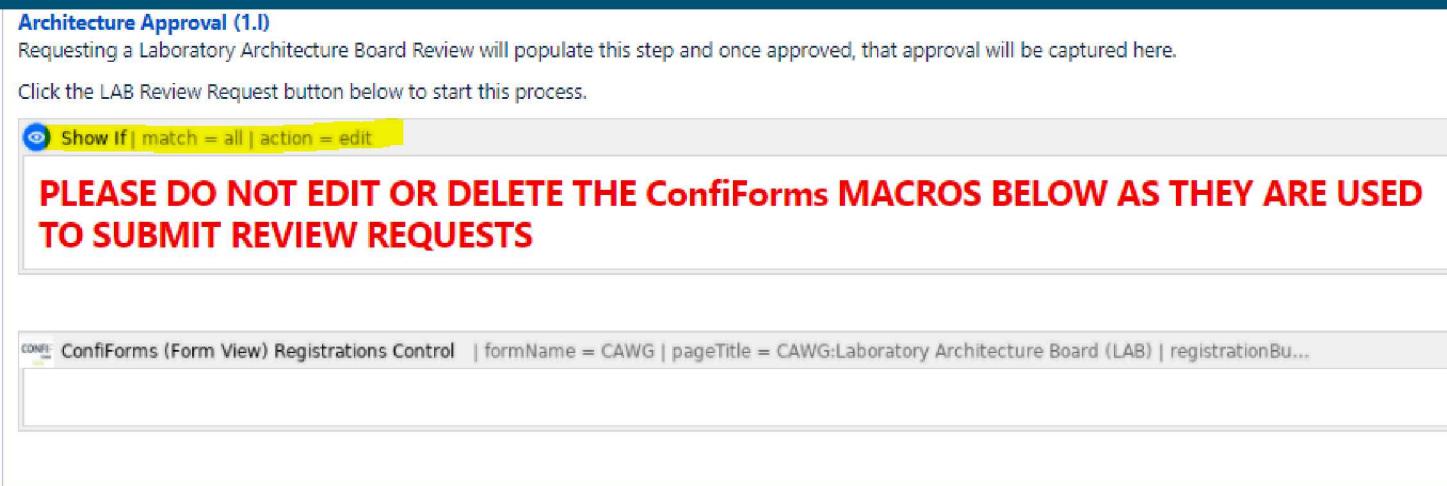
Architecture Approval (1.1)
Requesting a Laboratory Architecture Board Review will populate this step and once approved, that approval will be captured here.

Click the LAB Review Request button below to start this process.

Show If match = all | action = edit

PLEASE DO NOT EDIT OR DELETE THE ConfiForms MACROS BELOW AS THEY ARE USED TO SUBMIT REVIEW REQUESTS

ConfiForms (Form View) Registrations Control | formName = CAWG | pageTitle = CAWG:Laboratory Architecture Board (LAB) | registrationBu...

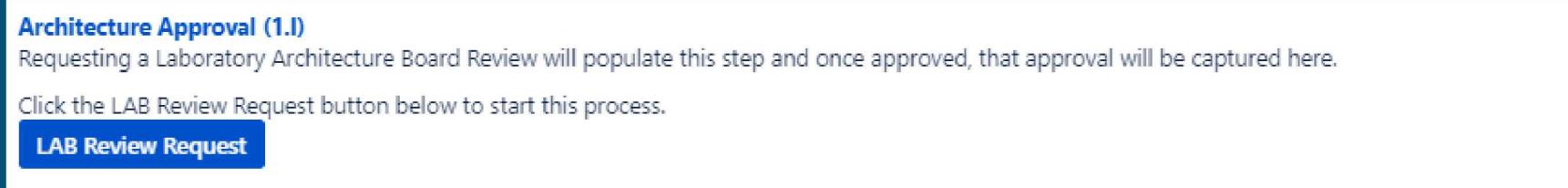


Published Confluence Page view

Architecture Approval (1.1)
Requesting a Laboratory Architecture Board Review will populate this step and once approved, that approval will be captured here.

Click the LAB Review Request button below to start this process.

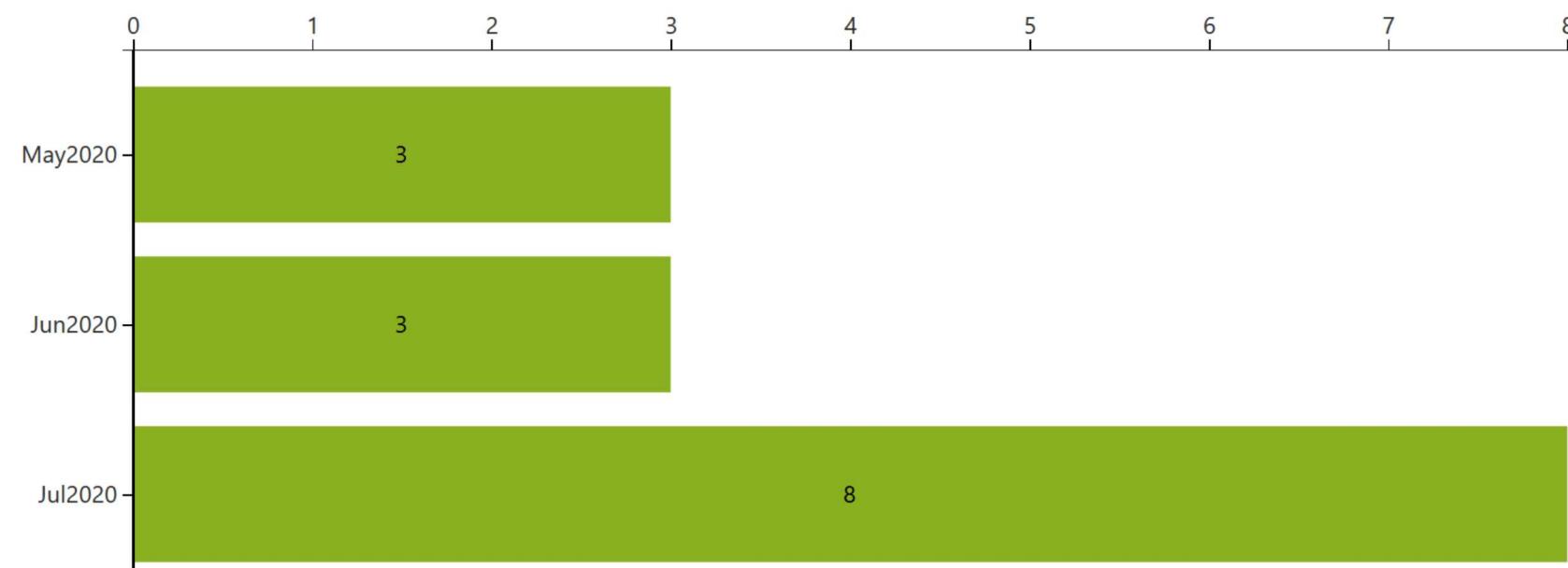
LAB Review Request



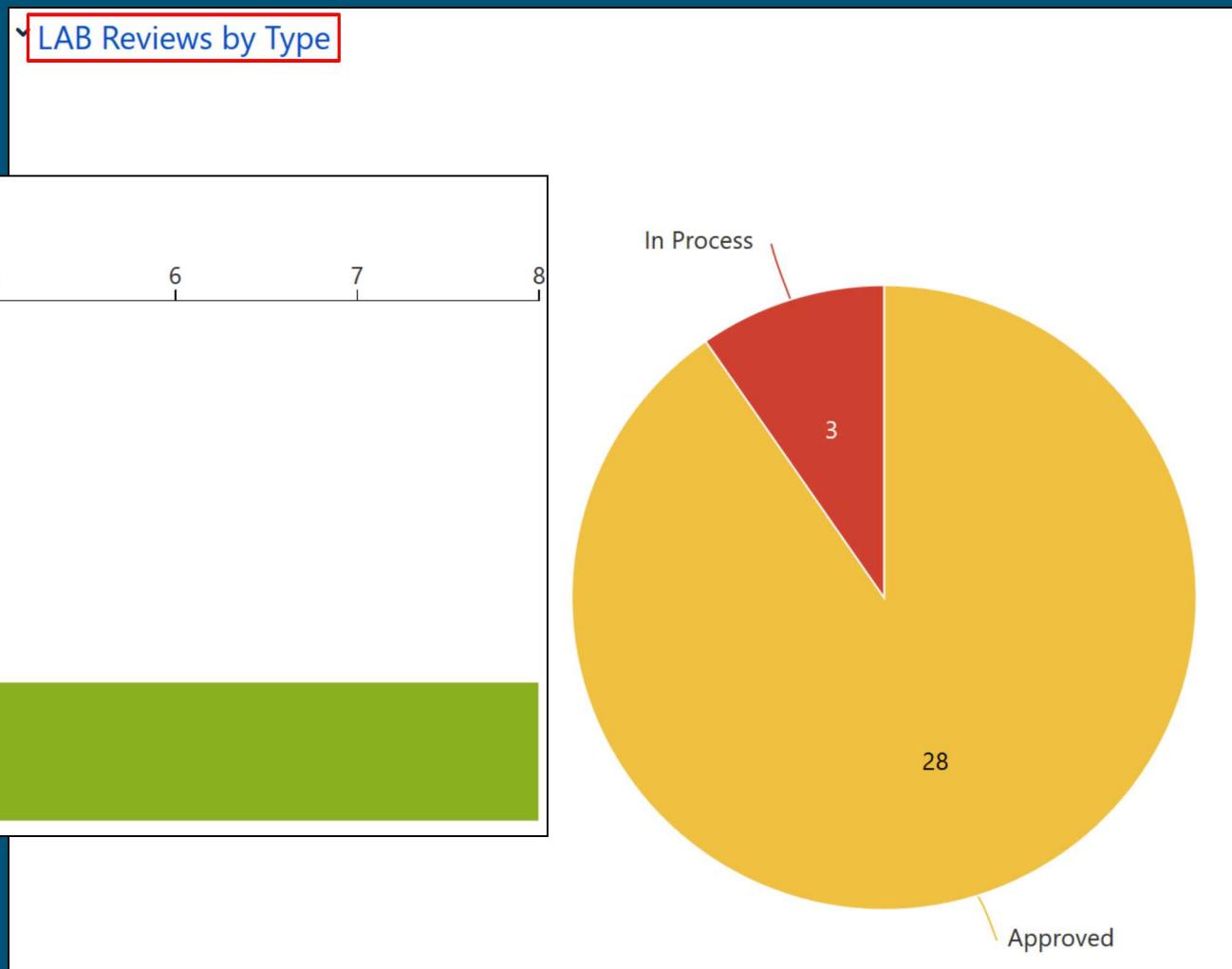
LAB Metrics

- Metrics of Approvals by Month
- Metrics of Reviews by Type

Historical LAB Approvals by Month



LAB Reviews by Type



Pivot Table Macro

- We used this Confluence Macro to create the Pie Chart and Bar Graphs to show LAB metrics

Horizontal Navigation Bar Page | title = LAB Review Statistics

Expand | LAB Reviews by Type

Chart from Table | column = Status | aggregation = 1. Title | datep...

Pivot Table | column = Status | type = Count | sort = false | deci...

Table Filter | column = Status | hideColumns = true | isOR = A...

ConfiForms TableView | formName = CAWG | pageTitle = La...

ConfiForms Form Field | fieldName = Status | filter...

ConfiForms Form Field | fieldName = Title

ConfiForms Form Field | fieldName = Requester

ConfiForms Form Field | fieldName = DispositionDate...

ConfiForms Form Field | fieldName = POCName

ConfiForms Form Field | fieldName = ITOrg

ConfiForms Form Field | fieldName = SolutionName

ConfiForms Form Field | fieldName = RiskImpactLevel

Edit 'Pivot Table' Macro

Macro generates a pivot table. Post Idea or Issue. Documentation

Data Source Options

Row labels Status

Column labels Click and start typing...

Calculated column Click and start typing...

Operation type Count

Preview

Status	Count
APPROVED	29
IN PROCESS	2
Total	31

Pivot Table settings

Row labels Status

Column labels Click and start typing...

Calculated column 1. Title

Operation type Count

Status = Click and start typing...

Hide Columns = Click and start typing...

Save Cancel

Conforms Field Types and Views used for the LAB Page

- Autopage
- Checkbox
- Date
- Radio Group
- Dropdown

- Calendar view
- Card view
- Table view

Creating a Conforms Form (Our implementation)



You will need the following:

Have Confluence installed

Install Conforms Macro Plugin

Cost for Sandia: \$5,000 for the Server version, \$2,500 every year after that

Status: Currently looking to the Data Center version which will cost \$6,000 per year

Use the following Conforms Macros:

- Conforms Form Definition
- Conforms Registration Control
- Conforms TableView

LAB Request Form

LAB Review Request Form

LAB Review Date	<input type="text" value="Sep 25, 2020"/> 
Disposition Date	<input type="text" value="Sep 28, 2020"/> 
1. Title	<input type="text" value="* **Do Not Delete**NLIT Presentation"/>
2. Requested By Name	<input type="text" value="* Jessica Eulalia Brito"/> 
3. Technical POC Name	<input type="text" value="* Marquita Apodaca"/> 
4. Responsible IT Organization	<input type="text" value="* NLIT"/>
5. What is the name of the new solution or standard?	<input type="text" value="* NLIT"/>
6. Describe the purpose of the new solution or standard. What does it do?	<input type="text" value="* This is a test demo do not delete"/>
7. Describe the business problem being addressed by this solution.	<input type="text" value="* This is a test demo do not delete"/>

1. Date

2. Required Fields

3. User names

LAB Request Form Continued

10. Which Solution Security Risk and Impact Level has been determined for your solution? *

Low
 Moderate
 High

11. What is the estimated total number of end users and /or consumers? *

14

12. What is the estimated maximum number of concurrent users? *

14

13. Is any portion of this technology developed in-house? *

Yes
 No

14. What interfaces will exist between this solution and current production resources? Examples of production resources are (not limited to): email, [REDACTED]
[REDACTED] *

tst

15. Is this solution the official source of enterprise data for Sandia? *

Yes
 No

16. Select all applicable data classification levels hosted by this solution. *

Classified
 PII
 OUO
 UUR
 Other

1. Text Field
2. Checkbox
3. Radio Button

LAB Request Form Continued

24. Can this solution be deployed and run on a thin client? *

Yes
 No

25. Choose the appropriate Disaster Recovery Tier. *

Tier 0
 Tier 1
 Tier 2
 Tier 3
 Tier 4
 DNR

26. Provide a detailed technical description of the architecture, including the names of any commercial products. *

NLIT test presentation

27. Is this associated to a reference architecture? *

Yes
 No

Enter a link to the Reference Architecture. SDL Reference Architectures can be found

[SDL Reference Architectures](#)

Please attach your architecture diagram. Also, tag the diagram with "itarch" and place it on the Virtual Architecture

No files selected.

1. Text Area

2. File Attachments

LAB Request Form Continued

28. Did you acquire any software as part of this solution?

Yes
 No

Have all software products acquired as part of the solution been approved by software governance?

Yes
 No

Owned By

ID a1957ce8-c8b0-43da-9cd4-b4095ff43eb3

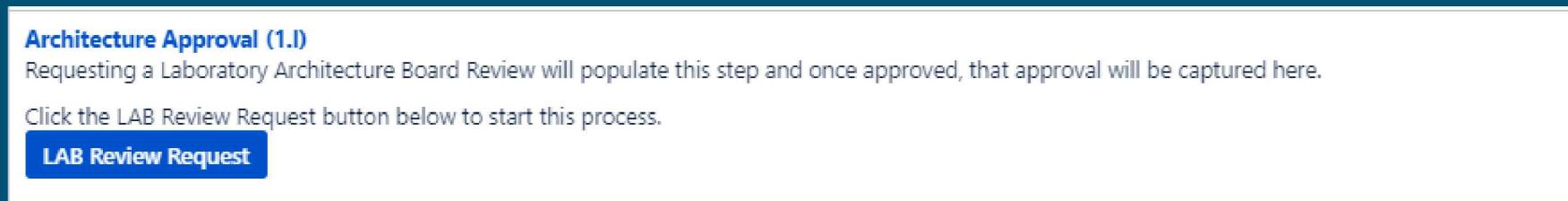
Created Sep 10, 2020 10:13

Created By jebrito

1. Autopage

Conforms Registration Control (User View)

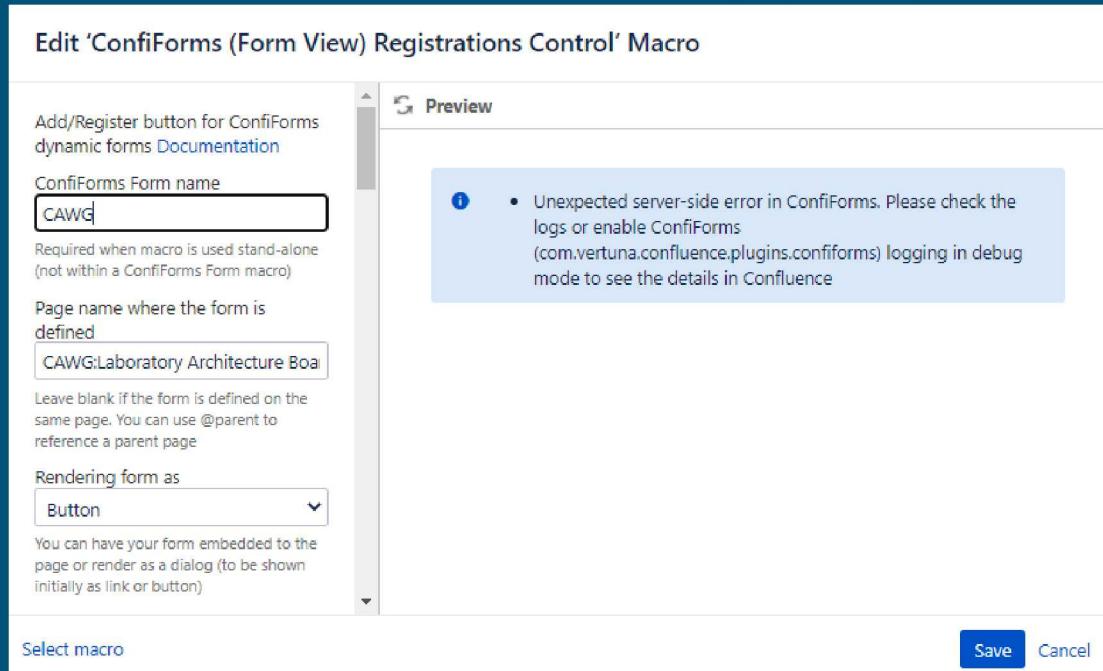
The button below depicts what a user sees when submitting a request



Architecture Approval (1.1)
Requesting a Laboratory Architecture Board Review will populate this step and once approved, that approval will be captured here.
Click the LAB Review Request button below to start this process.

LAB Review Request

You can customize the text that displays on your Conforms Button Request and other options



Edit 'ConfiForms (Form View) Registrations Control' Macro

Add/Register button for ConfiForms dynamic forms [Documentation](#)

ConfiForms Form name

Required when macro is used stand-alone (not within a ConfiForms Form macro)

Page name where the form is defined

Leave blank if the form is defined on the same page. You can use @parent to reference a parent page

Rendering form as

You can have your form embedded to the page or render as a dialog (to be shown initially as link or button)

Select macro

Save Cancel

Conforms Registration Control (Default View)

- Take the defaults from the Conforms Form Definition page

SDL Release Management Process (3.h)

Request a review by the Release Management Authority as outlined to the right and ensure approval is documented appropriately.

To request an [RMA](#) review, click the [Submit RMA](#) Review button below:

 Show If | match = all | action = edit

PLEASE DO NOT EDIT OR DELETE THE ConfiForms MACROS BELOW AS THEY ARE USED TO SUBMIT REVIEW REQUESTS

ConfiForms (Form View) Registrations Control | formName = RMA | pageTitle = SDLRMA:SDL Release Management Authority (RMA) | registrati...

Coniforms Registrations Control (Customized View)

Architecture Approval (1.1)

When your architecture is defined as a SPARA, you MUST submit a notification to the Laboratory Architecture Board (LAB) describing your solution's architecture. Notify the LAB by clicking the button below and filling out the form and clicking save. This will result in an email notification to the LAB. Your answers will also populate some fields in this evidence sheet. If there are any questions or concerns from the LAB, they will reply in email, otherwise you may continue capturing other evidence in your sheet. Submitting a SPARA Notification is sufficient evidence to complete this step barring any feedback or requests from the LAB.

 Show If | match = all | action = edit

PLEASE DO NOT EDIT OR DELETE THE ConiForms MACROS BELOW AS THEY ARE USED TO SUBMIT REVIEW REQUESTS

ConiForms (Form View) Registrations Control | formName = RefArch | pageTitle = CAWG:Laboratory Architecture Board (LAB) | registration...

ConiForms Form Field | fieldName = Title | withLab...

ConiForms Form Field | fieldName = Requester | wit...

ConiForms Form Field | fieldName = TechPOC | withL...

Select 1 or more categories below:

ConiForms Form Field | fieldName = SPARAAplicatio...

ConiForms Form Field | fieldName = SPARABuildNRele...

ConiForms Form Field | fieldName = EPICProject | w...

ConiForms Form Field | fieldName = SPARAHosting | ...

ConiForms Form Field | fieldName = CMProject | wit...

ConiForms Form Field | fieldName = ReleaseMgmt | w...

ConiForms Form Field | fieldName = Description | w...

ConiForms Form Field | fieldName = BusinessProblem...

ConiForms Form Field | fieldName = DataPlatform | ...

1.

2.

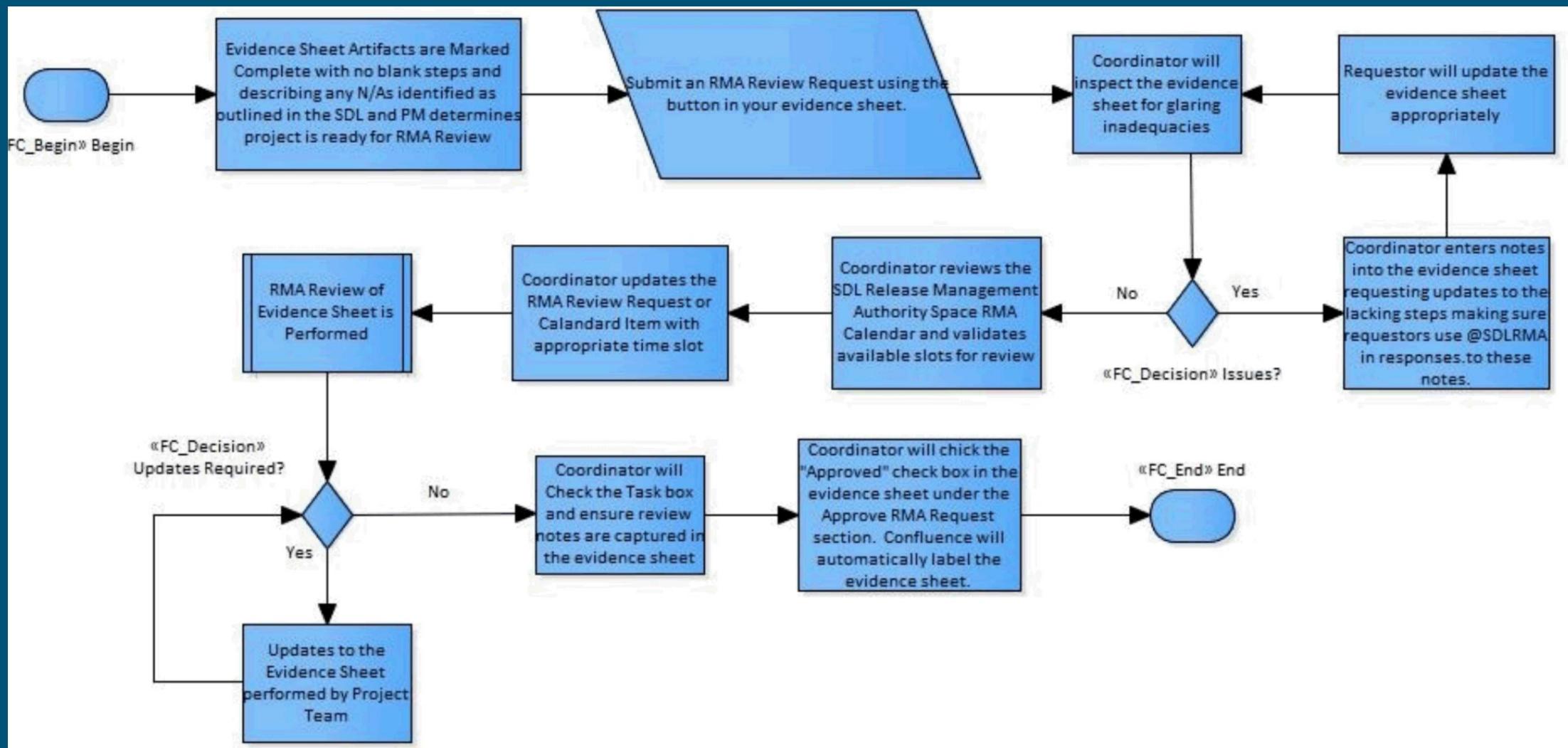
3.

Added Descriptive Text

Customized fields we wanted displayed in the form

Added other custom elements such as lines for separation

Release Management Authority Process



Release Management Authority (RMA)

SDL Release Management Process (3.h)
Request a review by the Release Management Authority as outlined to the right and ensure approval is documented appropriately.

To request an RMA review, click the Submit RMA Review button below:

Request RMA Review

RMA Request

Requested By: 

Request a Review (Please select a Wednesday between 4 and 5 pm): 

Optional Comments:

Approved:

RMA Requests

RMA Calendar

*** NOTE - IF you use Restrictions on your evidence sheet (The LOCK icon) CLICK HERE**

1. Created a Template and embedded the Conifoms Form within the Template
2. View of the Conifoms RMA Request form which allows users to submit a Request
3. Display results in the Confluence Template using the **Expand Macro**

Conifoms Form Release Management Authority (RMA)

RMA Request

Requested By:

Request a Review (Please select a Wednesday between 4 and 5 pm): MMM dd, yyyy HH:mm

Optional Comments:

Approved:

1. Username
2. Field Text
3. Date Field
4. Checkbox

Release Management Authority (RMA) Review Calendar and Coordinator Calendar

RMA Review Calendar

< > today

September 2020

month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
30	31		1 4p Sep 02, 2020 16:0 4:30p Sep 02, 2020 1 4:40p Sep 02, 2020 1	2	3	4	5
6	7	8 4:30p Sep 09, 2020 1	9	10	11	12	
13	14	15 4p Sep 16, 2020 16:0 4:30p Sep 16, 2020 1	16	17	18	19	
20	21	22 10:55a Sep 23, 2020 4p Sep 23, 2020 16:0 4p Sep 23, 2020 16:0	23	24	25	26	
27	28	29 4p Sep 30, 2020 16:0	30	1	2	3	
4	5	6	7	8	9	10	

RMA Table View

Evidence Sheets Ready for Review

Edit	Evidence Sheet	Optional Comments	Requested By	Requested Date/Time	Scheduled Date/Time
	DO NOT DELETE TEST - Create Evidence Sheet	**DO NOT DELETE** NLIT Presentation	 Jessica Eulalia Brito	Sep 16, 2020 16:50	

1.

This view displays all pending RMA Requests

Once an RMA Request has been approved, it will automatically be removed from this list through the use of a filter

Edit 'ConfiForms TableView' Macro

Table view for Confluence
ConfiForms plugin Documentation

ConfiForms Form name *
RMA

Page name where the form is defined
SDL Release Management Authorit

Leave blank if the form is defined on the same page. You can use @parent to reference a parent page

Filter to apply on entries dataset
Approved:False

See examples in macro preview window

Apply distinct filter to return only unique records

Select macro

Preview

Visible only in PREVIEW

Configuration helper for ListViews, TableViews, CardViews, PlainView, CleanView, CalendarViews and Registration Control macros

Hide

The following fields are defined in the form RMA and can be referenced from here.

- id
- createdBy
- ownedBy
- recordId
- created
- dateCreatedFormatted
- Page
- RequestedBy
- ReviewDate

Save Cancel

Release Management Authority (RMA) Coordinator Calendar

▼ RMA Requests

Page	***DO NOT DELETE*** TEST - Create Evidence Sheet
Requested By	 Jessica Eulalia Brito
Request a Review (Please select a Wednesday between 4 and 5 pm)	Sep 14, 2020 16:00
Optional Comments	**DO NOT DELETE** NLIT Presentation
Approved	Approved

[confluence] New RMA Request



Jessica Eulalia Brito <jebrito@sandia.gov>
To ✓ Brito, Jessica Eulalia

Hello,

A new RMA Request has been submitted for review.

Optional Comments: **DO NOT DELETE** NLIT Presentation

To view the RMA Calendar please see this site: [SDL Release Management Authority](#)

Link to Evidence Sheet: [***DO NOT DELETE*** TEST - Create Evidence Sheet](#)

Thank you

IFTT Integration

Email Notifications



ConfiForms IFTTT Integration Rules | event = onModified | action = Send Email | condition = Status:success | title = LAB Rev...

Hello

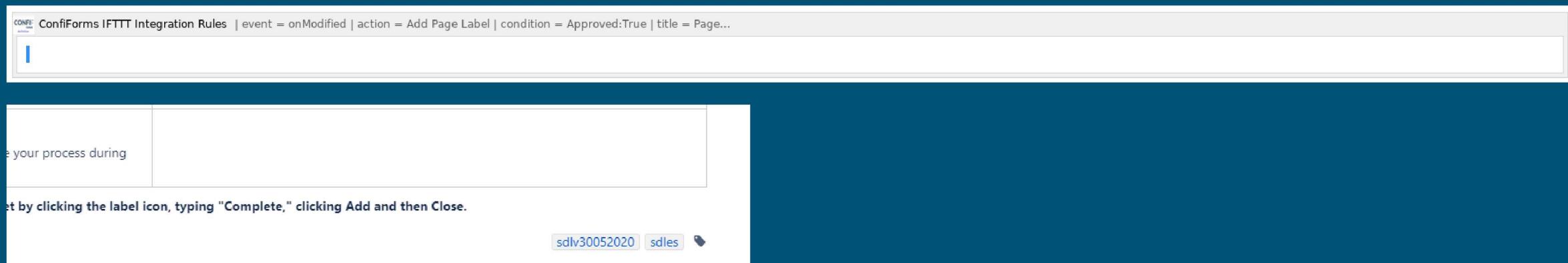
Your LAB request ConfiForms Form Field | fieldName = Title has been approved.

ConfiForms Form Field | fieldName = Title | withLab...

Disposition Comments:

ConfiForms Form Field | fieldName = Disposition

Autolabel Page



ConfiForms IFTTT Integration Rules | event = onModified | action = Add Page Label | condition = Approved:True | title = Page...

I

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Set your process during

Set by clicking the label icon, typing "Complete," clicking Add and then Close.

sdlv30052020 sdles

IFTTT Actions

1. Add Page Label
2. Send Email

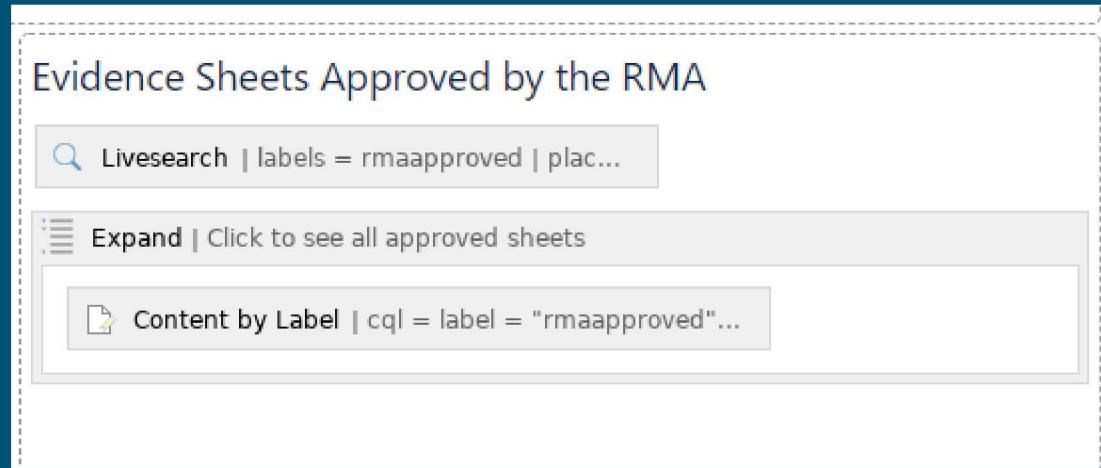
Actions list

There are 38 different actions supported by IFTTT out-of-the-box (some actions are very generic, so the integration scenarios number is a lot bigger)

- Add Attachment Label
- Add Page Label
- Add Page Watcher
- Audit
- Copy Attachment
- Applink Service
- Copy ConfiForms Data
- Copy ConfiForms Data to DB
- Create Attachment
- Create BlogPost
- Create Comment
- Create (Update) ConfiForms Entry
- Create Insight Object
- Create Jira Issue
- Create Page
- Delete Attachment
- Delete ConfiForms Entry
- Delete Page
- Force Page Re-index
- Generate Next Number
- Move Attachment
- Move Page
- Redirect to URL
- Remove Attachment Label
- Remove Page Label
- Remove Page Edit Restrictions
- Remove Page View Restrictions
- Remove Page Watcher
- Rename Page
- Restrict Page Edit
- Restrict Page View
- Render (execute) macro
- Run JavaScript
- Send Email
- Send Notification
- Set Page Revision
- Update Jira Issue
- Update ConfiForms Entries by Filter
- WebService Request

Evidence Sheets using Content by Label Macro from the RMA page

Once an RMA request has been approved, the Conforms IFTT will automatically trigger labelling the evidence sheet with “rmaapproved”



The screenshot shows a web interface with a title bar 'Evidence Sheets Approved by the RMA'. Below the title is a search bar with the text 'Livesearch | labels = rmaapproved | plac...'. Below the search bar is a button labeled 'Expand | Click to see all approved sheets'. At the bottom of the interface is a 'Content by Label' macro with the CQL 'cql = label = "rmaapproved"...'.

Resources



Conforms Documentation

<https://wiki.vertuna.com/display/CONFIFORMS/ConfiForms+Field+Types>

Conforms IFTT Documentation

<https://wiki.vertuna.com/display/CONFIFORMS/Configuring+ConfiForms+IFTTT+actions+and+rules>

Conforms Marketplace for Conforms

<https://marketplace.atlassian.com/apps/1211860/conforms-data-forms-workflows?hosting=cloud&tab=overview>