

# Migrating SharePoint Forms and Workflow to Confluence Using Confiforms



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



Sandia National Laboratories

# 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
---	------	----	-------	--------------	---------------	---------------	--------	----------------	------------------	------------------	-------------------	-------------------	-----------------

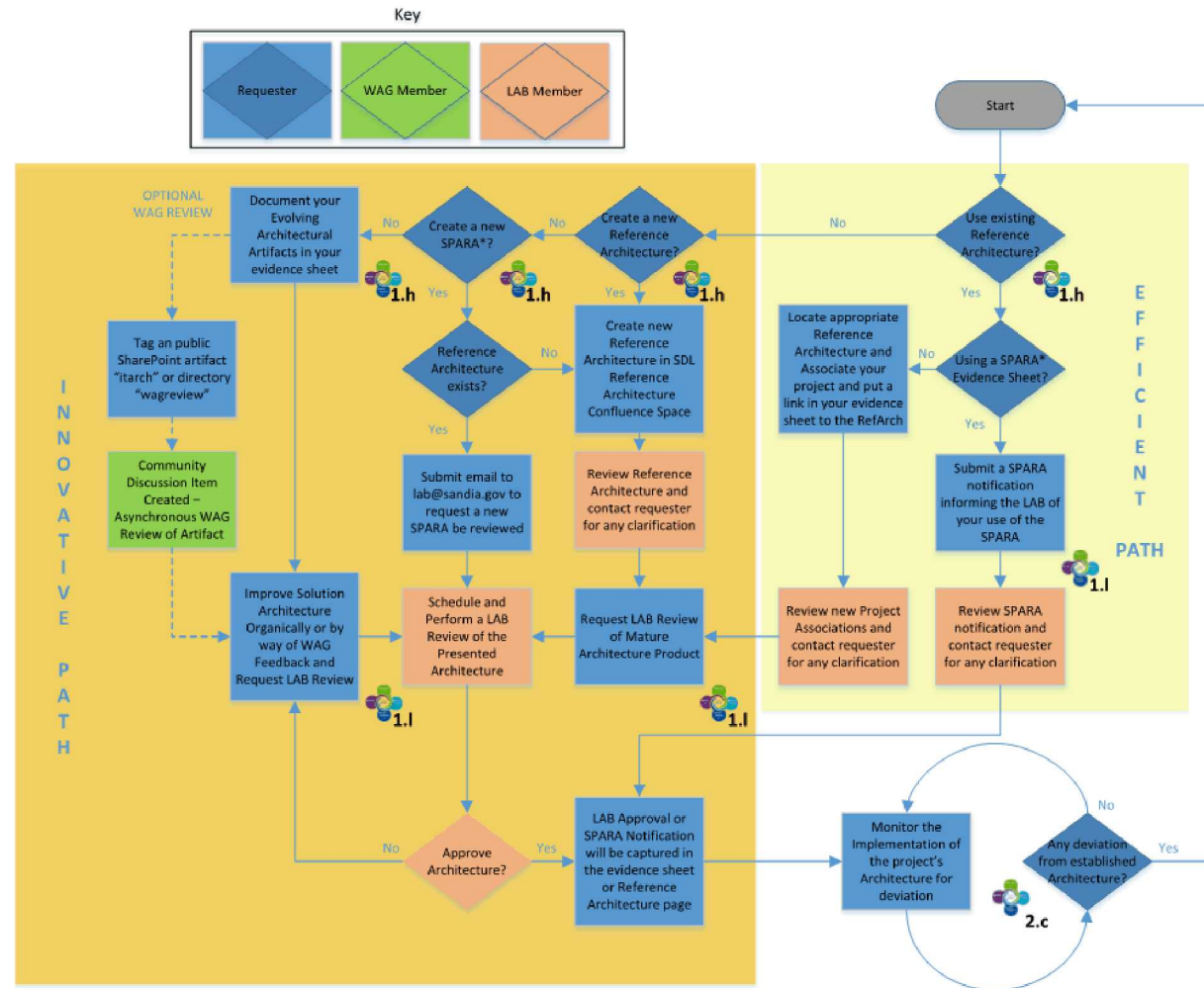
▷ **Status : 1. In Process** (1)

▷ **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



MY CAWG REQUESTS



ALL CAWG REQUESTS



CAWG STATISTICS

## • 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

Form: CAWG

Form: RefArch

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

Edit	Status	Title	Video	Disposition Notes	Requested by	Technical PoC	LAB Review Date	Disposition Date
<a href="#">Edit</a>	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 displays a Confluence page titled "Horizontal Navigation Bar". Inside the page, there is a macro titled "Horizontal Navigation Bar Page" with the title "My LAB Requests". This macro contains a "Table Filter" macro with the following configuration: isOR = AND, separator = Point (.), datepattern = dd M yy, default, and cell-width | lab... Below the table filter is a "ConfiForms TableView" macro with the configuration: formName = CAWG, pageTitle = Laboratory Architecture Board (LAB), and filter = [entry.\_us...]. Below the table view is an "Edit Controls for ConfiForms" macro with the configuration: showBoth = false and restrictions = [entry.\_user]. Below this are several "ConfiForms Form Field" macros, each with a different fieldName: Status, Title | overrid..., Artifacts | ove..., Disposition | o..., Requester | ove..., POCName | overr..., ReviewDate, and DispositionDate.

# Show button Feature Macro

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

Show	Edit	ID	Status	Title
Show				
Show				
Show	Edit	84	IN PROCESS	**Do Not Delete**NLIT Presentat

### LAB Review Request Form

ID: 84

Status: **IN PROCESS**

Disposition Notes: Testing for NLIT Presentation

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

LAB Review Date: Sep 25, 2020

Disposition Date: Sep 28, 2020

- Title: \* \*\*Do Not Delete\*\*NLIT Presentation
- Requested By Name: \* Jessica Eulalia Brito
- Technical POC Name: \* Marquita Apodaca
- Responsible IT Organization: \*
- What is the name of the new solution or standard? \* NLIT
- Describe the purpose of the new solution or standard. What does it do? \* This is a test demo do not delete
- Describe the business problem being addressed by this solution. \* This is a test demo do not delete
- What risks are identified with adopting this solution? \* none
- What risks are identified with NOT adopting this solution? \* none
- Which Solution Security Risk and Impact Level has been determined for your solution? \* Low

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

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

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

CONF: ConfForms View Control (EntryViewer)

CONF: Edit Controls for ConfForms | showBoth = false | restrictions = [entry\_user],mapodac,jgminer,jclane

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.I)

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**

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

## Published Confluence Page view

### Architecture Approval (1.I)

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

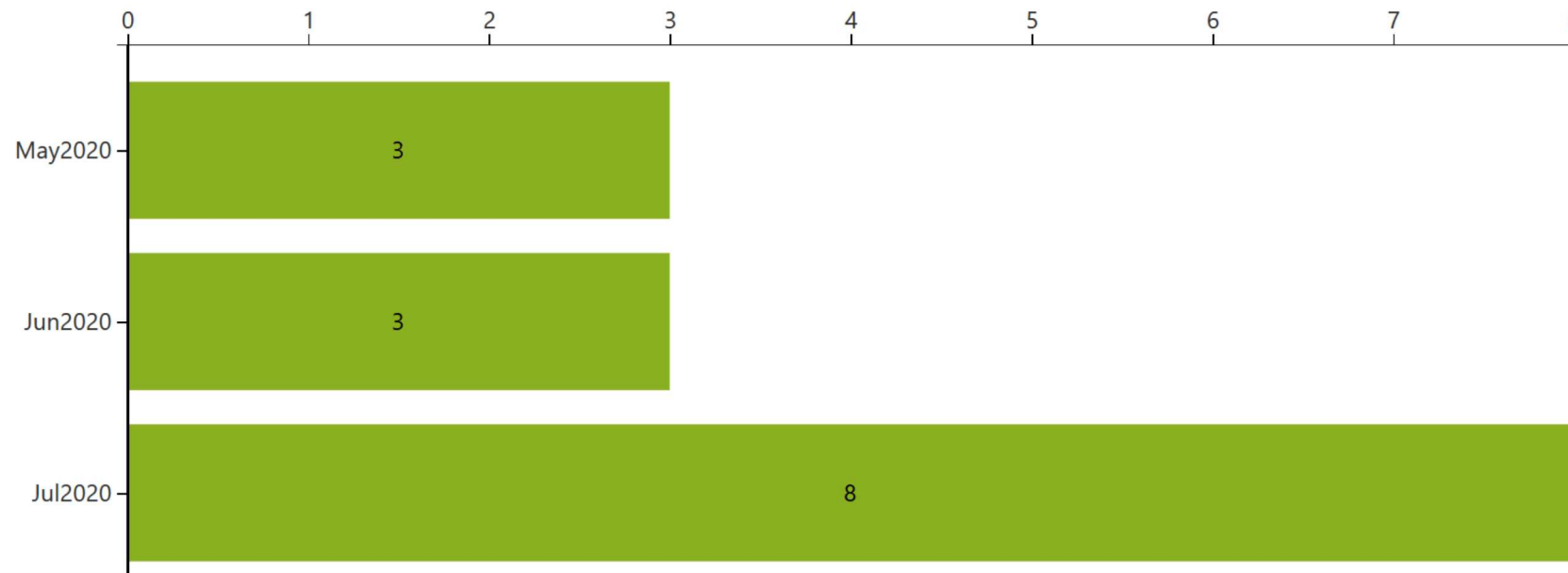
Click the LAB Review Request button below to start this process.

LAB Review Request

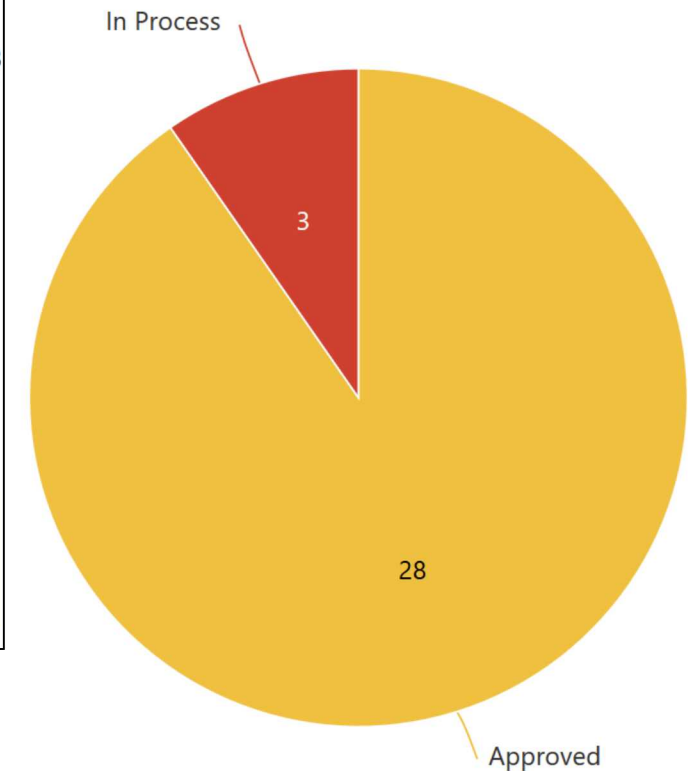
## LAB Metrics

- 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 | dec

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

ConfiForms TableView | formName = CAWG | pageTitle = L

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 X

Column labels  
Click and start typing...

Calculated column  
Click and start typing...

Operation type  
Count X

**Preview**

Status	Count
APPROVED	29
IN PROCESS	2
<b>Total</b>	<b>31</b>

**Pivot Table settings**

Row labels  
Status X

Column labels  
Click and start typing...

Calculated column  
1. Title X

Operation type  
Count X

Status = Click and start typing...

Hide Columns = Click and start typing...

Select macro

Save Cancel

## Confiforms Field Types and Views used for the LAB Page

- Autopage
- Checkbox
- Date
- Radio Group
- Dropdown

- 
- Calendar view
  - Card view
  - Table view

## Creating a Confiforms Form (Our implementation)

### You will need the following:

Have Confluence installed

Install Confiforms 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 Confiforms Macros:

- Confiforms Form Definition
- Confiforms Registration Control
- Confiforms TableView



# LAB Request Form

## LAB Review Request Form

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

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

test

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

Browse... No files selected.

1. Text Area

2. File Attachments

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

 jebrito x

ID

a1957ce8-c8b0-43da-9cd4-b4095ff43eb3

Created

Sep 10, 2020 10:13

Created By

jebrito

1. Autopage



# Conifforms Registration Control (User View)

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

## Architecture Approval (1.I)

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 Conifforms 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

Button

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

Preview

Unexpected server-side error in ConfiForms. Please check the logs or enable ConfiForms (com.vertuna.confluence.plugins.confiforms) logging in debug mode to see the details in Confluence

Select macro

Save Cancel




## Confiforms Registration Control (Default View)

- Take the defaults from the Confiforms 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...

# Confiforms Registrations Control (Customized View)

## Architecture Approval (1.0)

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 Confiforms MACROS BELOW AS THEY ARE USED TO SUBMIT REVIEW REQUESTS**

CONF: Confiforms (Form View) Registrations Control | formName = RefArch | pageTitle = CAWG:Laboratory Architecture Board (LAB) | registratio...

CONF: Confiforms Form Field | fieldName = Title | withLab...

CONF: Confiforms Form Field | fieldName = Requester | wit...

CONF: Confiforms Form Field | fieldName = TechPOC | withL...

Select 1 or more categories below:

CONF: Confiforms Form Field | fieldName = SPARAAplicatio...

CONF: Confiforms Form Field | fieldName = SPARABuildNRele...

CONF: Confiforms Form Field | fieldName = EPICProject | w...

CONF: Confiforms Form Field | fieldName = SPARAHosting | ...

CONF: Confiforms Form Field | fieldName = CMPProject | wit...

CONF: Confiforms Form Field | fieldName = ReleaseMgmt | w...

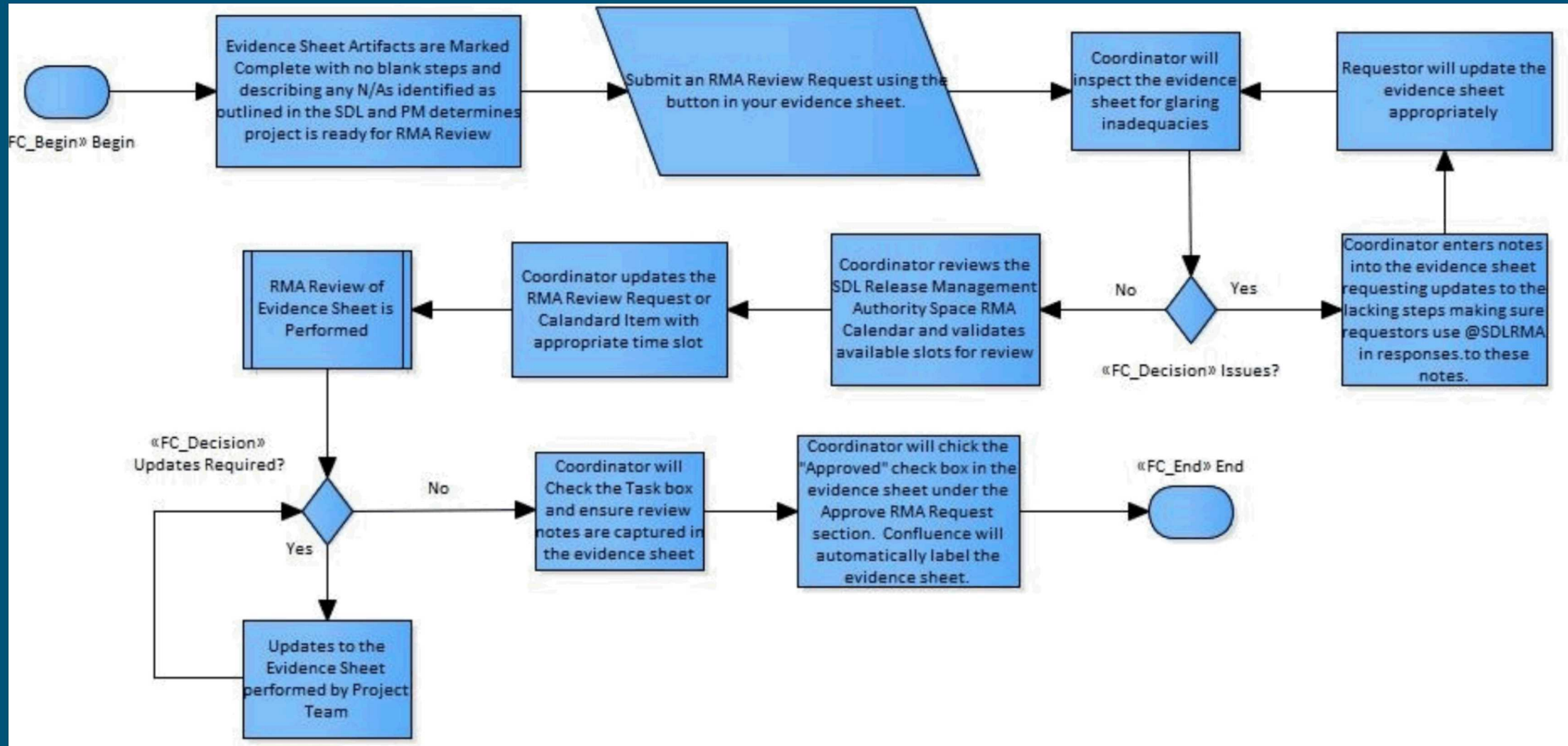
CONF: Confiforms Form Field | fieldName = Description | w...

CONF: Confiforms Form Field | fieldName = BusinessProblem...

CONF: Confiforms Form Field | fieldName = DataPlatform |

1. Added Descriptive Text
2. Customized fields we wanted displayed in the form
3. 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 Requests**

[RMA Calendar](#)

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

**RMA Request**

**Requested By:**  

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

**Optional Comments:**

**Approved:** ☐

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

# Confiforms 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	2	3	4	5
			4p Sep 02, 2020 16:00 4:30p Sep 02, 2020 16:00 4:40p Sep 02, 2020 16:00			
6	7	8	9	10	11	12
			4:30p Sep 09, 2020 16:00			
13	14	15	16	17	18	19
			4p Sep 16, 2020 16:00 4:30p Sep 16, 2020 16:00			
20	21	22	23	24	25	26
			10:55a Sep 23, 2020 4p Sep 23, 2020 16:00 4p Sep 23, 2020 16:00			
27	28	29	30	1	2	3
			4p Sep 30, 2020 16:00			
4	5	6	7	8	9	10

## 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

2.

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 \*

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

Filter to apply on entries dataset

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 <jebrit@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

## Email Notifications

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

Hello

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

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

Disposition Comments:


CONFIRMATION: ConfiForms Form Field | fieldName = Disposition

## Autolabel Page

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

Describe your process during

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

sdlv30052020 sdles 

1. Add Page Label

2. Send Email

#### Actions list

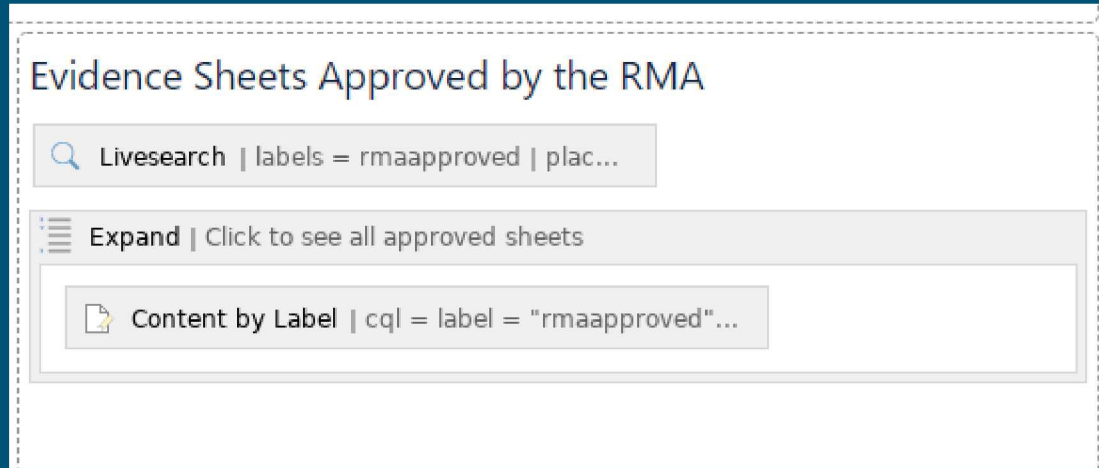
There are **38** different actions supported by IFTTT out-of-the-box (some actions are very generic, so the integration scenarios number is a lot bigger)

- 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 Confiforms IFTT will automatically trigger labelling the evidence sheet with “rmaapproved”



## 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>