


# Filtration aggregation and visualization of data collected with ConfiForms



In this tutorial, you will learn how to create a requirement submission form with ConfiForms add-on and further process the collected information with [Table Filter and Charts](#) add-on.

As a product owner, you can use this tutorial to quickly collect requirements from stakeholders and then analyze them in Confluence.

The tutorial will include the following steps:

- creation of the requirement submission form
- collection of data
- filtration of collected requirements
- aggregation of collected requirements against specific criteria
- visualization of collected requirements with dynamical charts

In order to perform data filtration, aggregation, and visualization, you need to install [Table Filter and Charts](#) add-on.

## Creation of the requirement submission form

1. We start with a creation of the requirement submission form. We create a new page and insert the **ConfiForms Form (Definition)** macro here.
2. While editing this macro, specify the form name as '**requirementSubmission**' and set its title. After this save the macro.
3. Within the **ConfiForms Form (Definition)** macro, add the seven **ConfiForms Form Field (Definition)** macros with the settings as follows:

	Field Name	Field Label	Required	Field Type	Field Description	Values	Notes
1	requirement	Requirement Description	Yes	Textarea	Enter your project requirement	None	
2	component	Component	No	Dropdown	Select the component	<ul style="list-style-type: none"><li>• Back-end</li><li>• Frontend</li></ul>	
3	category	Category	No	Dropdown	Select the category	<ul style="list-style-type: none"><li>• Interface</li><li>• Usability</li><li>• Functionality</li><li>• Performance</li><li>• Reliability</li><li>• Compatibility</li></ul>	
4	priority	Priority	No	Dropdown	Select the priority	<ul style="list-style-type: none"><li>• Critical</li><li>• High</li><li>• Medium</li><li>• Low</li></ul>	
5	expectedDeliveryDate	Expected Delivery Date	No	Date	Pick the expected delivery date		Dates in the <b>MMM dd, yyyy</b> format.
6	relatedIssue	Related JIRA Issue	No	JIRA Issue	Link the requirement to JIRA issue.		Requires the configured application link to JIRA.
7	author	Author	Yes	User	Specify the author of the requirement		

4. Finally, insert the **ConfiForms Form Registration Control** macro. This macro will register the submitted requirements. While configuring it, you need to enter the form name 'requirementSubmission' and name of the page where it locates.
5. After all manipulations you should have something like this:

The screenshot shows the ConfiForms editor interface. At the top, there is a navigation bar with tabs for 'File', 'Edit', 'View', 'Tools', and 'Help'. Below this, a toolbar contains various icons for editing and viewing. The main workspace displays a macro definition for 'Add-on Requirements'. The macro definition includes fields for 'formName', 'registrationFormTitle', and 'embedded'. A sidebar on the right lists available macros, including 'ConfiForms Form Field (Definition)' and 'ConfiForms Form Registration Control'. A callout box highlights the 'Add-on Requirements' macro definition.

**ConfiForms Form (Definition) macro**

**ConfiForms Form Field (Definition) macro**

**ConfiForms Form Registration Control macro**

6. Save the page.
7. **Share the page** with stakeholders.

The screenshot shows a Confluence page titled "Add-on Requirements" under the "Requirements Home" space. The page was created by Peter Jacobs. The main content area contains a form titled "Submit Your Project Requirements". The form fields are as follows:

- Requirement Description \***: A text area containing the text: "The add-on should automatically distribute uploaded files across categories based on the naming pattern/file extension/or regular expression."
- Component**: A dropdown menu with "Frontend" selected. Below it, the text "Enter your project requirement" and "Select the component" are visible.
- Category**: A dropdown menu with "Functionality" selected. Below it, the text "Select the category" is visible.
- Priority**: A dropdown menu with "High" selected. Below it, the text "Select the priority" is visible.
- Expected Delivery Date**: A date picker showing "Aug 26, 2017". Below it, the text "Pick the expected delivery date" is visible.
- Related JIRA Issue**: An empty text input field.
- Author \***: A dropdown menu showing "Peter Jacobs (admin)". Below it, the text "Specify the author of the requirement" is visible.

At the bottom of the form is a "Save" button. A small "+" button is also visible above the "Save" button. The left sidebar contains navigation icons for home, documents, and a search icon.

## Collection of project requirements

1. Create a new page.
2. Insert the **ConfiForms TableView** macro. Specify the form name '**requirementSubmission**' and the page where it is stored for pulling the collected data from.
3. Insert the **ConfiForms Form Field** macro for each data entry field available on the requirement submission form.
4. Finally, you should have something like this:

Requirements / Pages / Requirements Home / Resulting Table with Requirements

## Resulting Table with Requirements

ConfiForms TableView macro

ConfiForms TableView | formName = requirementSubmission | pageTitle = Add-on Requirements

ConfiForms Form Field macro

ConfiForms Form Field | fieldName = requirement

ConfiForms Form Field | fieldName = component

ConfiForms Form Field | fieldName = category

ConfiForms Form Field | fieldName = priority

ConfiForms Form Field | fieldName = expectedDelivery...


ConfiForms Form Field | fieldName = relatedIssue

ConfiForms Form Field | fieldName = author

What did you change? ☐ Notify watchers

5. Save the page. As the result you will get a table with all requirements collected from stakeholders.

## Filtration of project requirements

 For filtering the table with collected requirements we will use the [Table Filter](#) macro from [Table Filter and Charts](#) add-on.

1. Edit the page with the **ConfiForms TableView** macro.
2. Insert the **Table Filter** macro by entering `{Table Filter}`.
3. Place the **ConfiFormsTable View** macro within the Table Filter macro and save the page.
4. On the filtration pane, click the cogwheel icon, and then select **Add filter**.
5. Add the following filter types:
  - a dropdown filter for the Priority column
  - a date filter for the Expected Delivery Date column
  - a free text filter for the Requirement Description column

Confluence Spaces People Contacts Create ...

Pages / Requirements Home

## Resulting Table with Requirements

Created by Peter Jacobs, last modified just a moment ago

Priority = Click or start typing... Expected Delivery Date = from M dd, yy to M dd, yy

**Click to add new filters**

**Select the filter you want**

**Filtration pane**

Requirement Description	Component	Category	Priority	Expected Delivery Date	Related JIRA Issue	Author
The add-on should support drag-n-drop file upload.	Frontend	Usability	High	Apr 01, 2017	<a href="#">SMART-1 - Support for drag-n-drop file upload in JIRA - TO DO</a>	Vadim Rutkevich
The add-on should support file upload through transition forms.	Frontend	Usability	High	May 01, 2017	<a href="#">SMART-2 - File upload through transition forms - TO DO</a>	Peter Olvarez
The add-on should be compatible with JIRA Data Center.	Back-end	Compatibility	Critical	Mar 15, 2017	<a href="#">SMART-3 - Compatibility with JIRA Data Center - TO DO</a>	Peter Jacobs
The add-on should support per-project configuration.	Back-end	Functionality	High	Mar 01, 2017		Ashley Stone
The add-on should support upload of attachments to categories when adding/editing issues.	Frontend	Usability	High	Apr 12, 2017	<a href="#">SMART-4 - Upload of attachments on Create/Edit Issue forms. - TO DO</a>	Ashley Stone
The add-on should support configuration of attachment categories.	Back-end	Functionality	Critical	Mar 23, 2017	<a href="#">SMART-5 - Configuration of attachment categories - TO DO</a>	Jill Svensen

6. Click the cogwheel icon, and then select **Modify settings**. Set the correct date format as 'M dd, yy'

7. Proceed to table data filtration, as follows:

- filter requirements by priority (Critical, High, and Medium);
- enter the regular expression 'function|validator|upload' to look up for requirements containing any of these words;
- filter requirements which delivery date is expected in the nearest 3 month by entering the dynamic time query '3m'.

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Pages / Requirements Home

## Resulting Table with Requirements

Created by Peter Jacobs, last modified just a moment ago

Priority = Critical High Medium Requirement Description = function|validator|uplo Expected Delivery Date = from M dd, yy to 3m

Requirement Description	Component	Category	Priority	Expected Delivery Date	Related JIRA Issue	Author
The add-on should support drag-n-drop file upload.	Frontend	Usability	High	Apr 01, 2017	<a href="#">SMART-1 - Support for drag-n-drop file upload in JIRA - TO DO</a>	Vadim Rutkevich
The add-on should support file upload through transition forms.	Frontend	Usability	High	May 01, 2017	<a href="#">SMART-2 - File upload through transition forms - TO DO</a>	Peter Olvarez
The add-on should support upload of attachments to categories when adding/editing issues.	Frontend	Usability	High	Apr 12, 2017	<a href="#">SMART-4 - Upload of attachments on Create/Edit Issue forms. - TO DO</a>	Ashley Stone
The add-on support workflow validator - Category is not empty	Back-end	Functionality	High	Jun 09, 2017		Den Stevens
The add-on should support a post-function - Move attachments to category	Back-end	Functionality	High	May 05, 2017		Ted Wilson
The add-on should support a post-function - Delete attachments from category	Back-end	Functionality	High	May 28, 2017		Ted Wilson
The add-on should support upload of attachments to multiple categories on transition forms	Frontend	Usability	Critical	May 12, 2017	<a href="#">SMART-11 - Upload of attachments to multiple categories in forms - TO DO</a>	Peter Jacobs

## Aggregation of requirements against specific criteria

**i** For filtering the table with collected requirements we will use the [Pivot Table](#) macro from [Table Filter and Charts](#) add-on. It allows you to create multi-dimensional pivot tables for summarizing table data in Confluence.

1. Edit the page with the **ConfiForms TableView** macro.
2. Insert the **Pivot Table** macro by entering `{Pivot Table}`.
3. Place the macro structure within the **Pivot Table** macro and save the page.
4. On the pivot table management pane, select the appropriate columns of the source table for the Column and Row labels of the resulting pivot table.
5. You can apply some filtration criteria to get the refined results.

The screenshot shows a Confluence page titled "Resulting Table with Requirements" created by Peter Jacobs. The page displays a pivot table summarizing requirements by category and priority. To the right of the table are two configuration panels: "Pivot Table settings" and a filter panel.

Category / Priority	Count			
	Critical	High	Medium	Total
Compatibility	1	3		4
Functionality	1	15	2	18
Interface		1		1
Performance		1		1
Usability	2	6	2	10
Total	4	26	4	34

**Pivot Table settings**

- Row labels: Category x
- Column labels: Priority x
- Calculated column: Author x
- Operation type: Count x

**Filter panel:**

- Priority = [Click or start typing...]
- Requirement Description = [Start typing...]
- Expected Delivery Date = from M dd, yy to Sep 01, 2017

## Visualization of table with aggregated project requirements

**i** For visualizing the table with aggregated data we will use the [Chart from Table](#) macro from [Table Filter and Charts](#) add-on.

1. Edit the page with the **ConfiForms TableView** macro.
2. Insert the **Chart from Table** macro by entering `{Chart from Table}`. Move the whole macro structure within it. Finally, it should look like this:

Requirements / Pages / Requirements Home / Resulting Table with Requirements

## Resulting Table with Requirements

Chart from Table macro

Chart from Table | datepattern = M dd, yy | separator = Point (.) | align = Center | dataorientation = Ver...

Pivot Table macro

Pivot Table | column = Category | row = Priority | aggregation = Author | type = Count | sort = false...

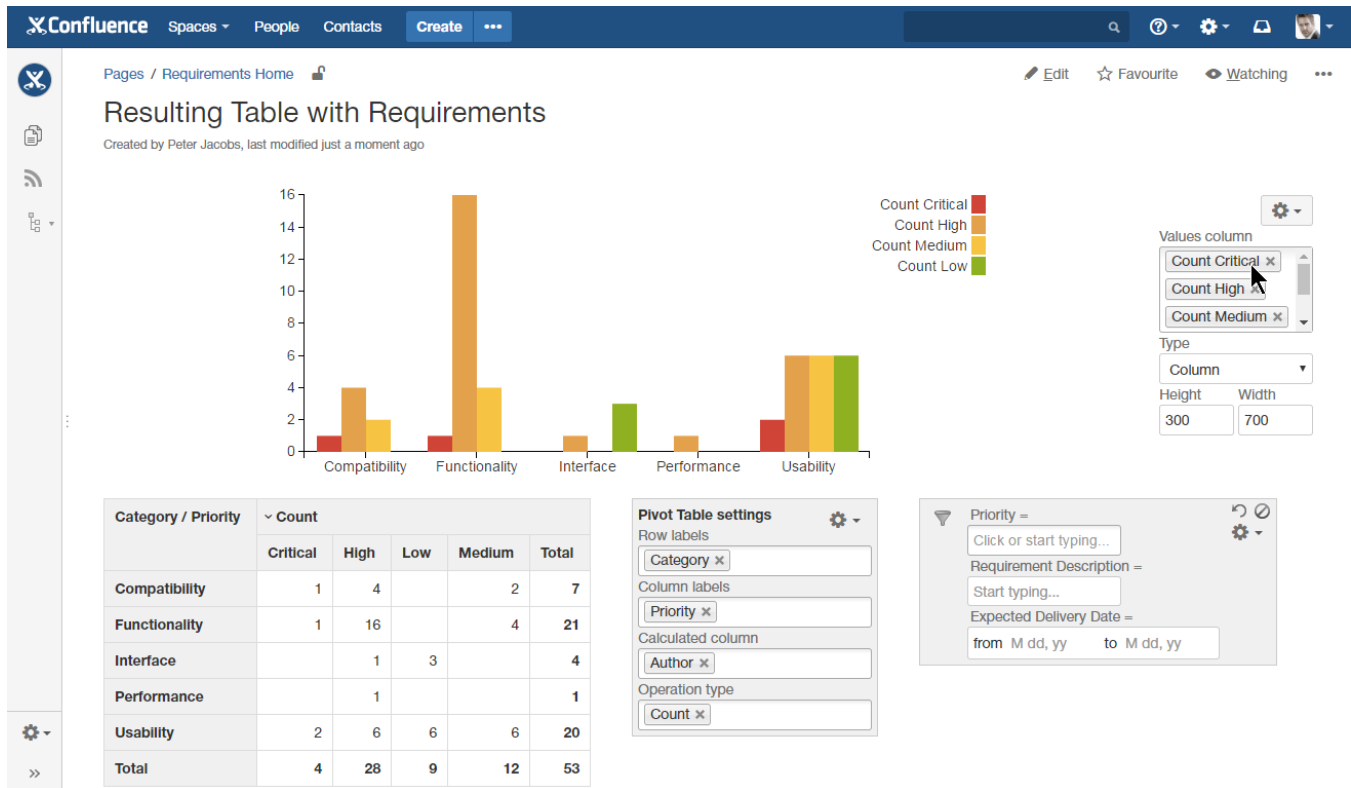
Table Filter | column = Priority | userfilter = Requirement Description | datefilter = Expected Delive...

ConfForms TableView | formName = requirementSubmission | pageTitle = Add-on Requirements

- ConfForms Form Field | fieldName = requirement
- ConfForms Form Field | fieldName = component
- ConfForms Form Field | fieldName = category
- ConfForms Form Field | fieldName = priority
- ConfForms Form Field | fieldName = expectedDeliver...
- ConfForms Form Field | fieldName = relatedIssue
- ConfForms Form Field | fieldName = author

What did you change? ☐ Notify watchers

3. Save the page.
4. Select chart type as 'Column'.
5. Select the columns with numeric values for chart generation.
6. Regulate the dimensions of the chart by entering the appropriate width and height of the chart.
7. Filter the source table by some criteria and get the dynamically update pivot table and the chart generate on its basis.



Have a look at the video tutorial provided by our friends at [StiltSoft](#), the authors of a great add-on called [Table Filter and Charts for Confluence](#)