

Live Forms for Confluence

Overview

With Live Forms for Confluence, you can easily create forms & workflows fully integrated with Confluence without any programming.

- **Drag and drop** Designer
- **Fully integrated** with Confluence
- **Rich**, Dynamic User Experience
- **Create/Update** Confluence pages
- **Built-in** Business Capabilities
- **Built-in Digital Signatures** for data integrity and security
- **Works** with your data, business systems, databases, Google Apps etc.
- **Conditional** routing based on form data
- **Supports** all standard browsers. No browser add-ons are required
- **100% Customizable** to fit into your web site
- **Security** 128-bit encryption

You may notice:

- The submissions view has a new look to allow the user to search submissions using fields in your form/flow. Confluence users will only see this view. The legacy submissions view is still available if you log directly into your Live Forms Confluence tenant.
- The submissions Export to Excel feature has been replaced by the [Download Submissions to CSV feature](#) which produces a csv file that can easily be opened in Excel.

Please begin using the [redesigned submission view](#) as soon as possible. The submissions Export to Excel feature, along with the legacy submissions view, will be removed in the next major release.

- The Task List also has the capability to search for tasks by specifying fields in your form/flow as search criteria.

The [SharePoint Connector](#) is not available for frevo Confluence customers.

Live Forms for Confluence

[Add-on Installation](#)

[Using the Add-on](#)

[Add-on Macros](#)

[Create and Update Pages](#)

[Merging to a Page](#)

[Workflows in Confluence](#)

[Compatibility with Other Add-ons](#)

[FAQ - Confluence Live Forms Add-on](#)

[Company Picnic Invitation Form with CSV Download in Confluence Tutorial](#)

Refer to the [Confluence Add-on Release Notes](#) to review the complete compatibility matrix for supported versions of Live Forms, the frevo Confluence add-on and the Confluence Server.

Quick Resources

- See how easy it is to create a survey form, add it to a Confluence page and view the results in Confluence or download them to Microsoft Excel: : [read tutorial](#) or [view video](#) if you are using Confluence v4.0 - 4.2. Changes to Confluence v4.3 or v5.1 are noted in the documentation where applicable..
- You can easily create/update Confluence pages using forms: [read documentation](#) or [view video](#) if you are using Confluence v4.0 - 4.2. Changes to Confluence v4.3 or v5.1 are noted in the documentation where applicable.
- You can collect form/flow submissions into a single Confluence page: [read documentation](#) or [view video](#) if you are using Confluence v4.0 - 4.2. Changes to Confluence v4.3 or v5.1 are noted in the documentation where applicable.
- Create multi-user workflows integrated with Confluence: [read documentation](#) or [view video](#) if you are using Confluence v4.0 - 4.2. Changes to Confluence v4.3 or v5.1 are noted in the documentation where applicable.
- [Read the documentation](#) on using the add-on if you are using Confluence v4.0 - 4.2. Changes to Confluence v4.3 or v5.1 are noted in the

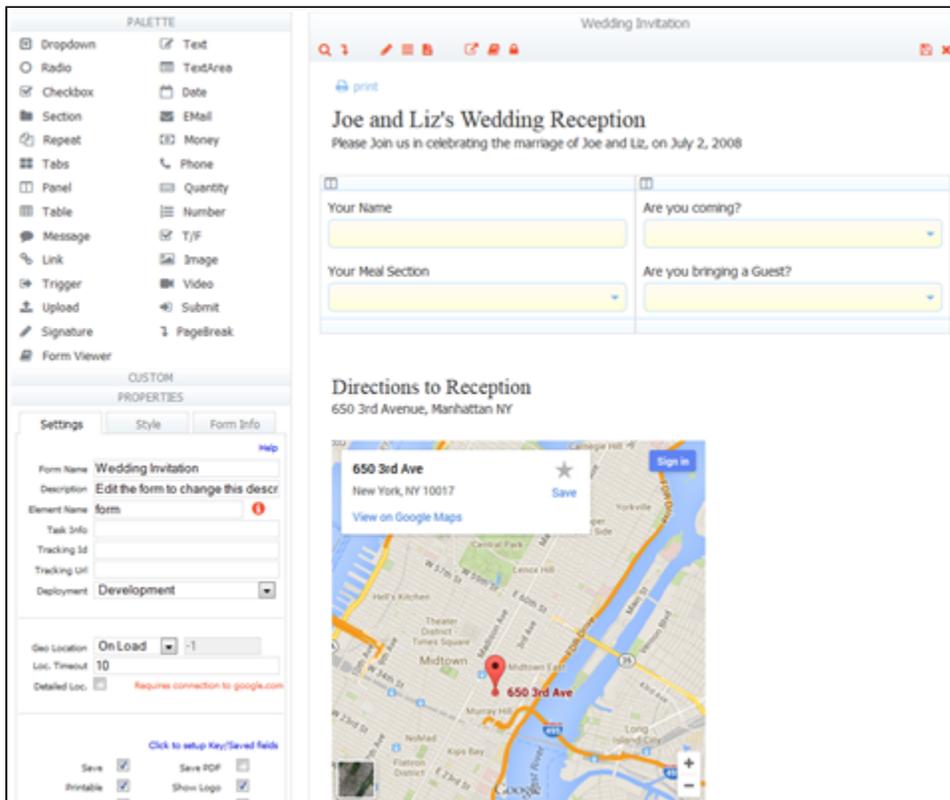
- documentation where applicable.
- To explore the complete features of Live Forms, view the [Live Form's documentation](#).

You may notice a difference in the location of the functions to Add Live Forms, flows, submissions and the Task List to Confluence pages when viewing the videos referenced above if you are using Confluence v5. These functions are located on the Tools Menu in Confluence v5. Changes are discussed in detail in the documentation.

When would I use Live Forms?

Live Forms can vary from basic event registration and contact information forms to the those forms required by sophisticated business applications such as patient registration, new client intake etc. Such business forms are often large and complex and require sophisticated layouts such as sections, repeating items (multiple addresses), tabs, expand/collapse, dynamic data and dynamic behavior and complex validations. Live Forms forms meet all these requirements and more. You can create or update existing Confluence pages, as well as merge form submission data into an existing Confluence page.

Live Forms also provides the ability to create Approval Workflows such as Vacation Request (employee requests vacation; manager approves it via a digital signature), Patient Referral (Assistant fills in an e-form with patient/insurance information; Doctor must digitally sign it before sending to the hospital), Student Enrollment etc. These workflows are fully integrated with the logged-in Confluence user.



What is Live Forms™ Designer?

Live Forms™ Designer leverages Ajax technologies to enable you to easily create rich, dynamic, Web 2.0 forms and workflows using your standard browser without ever leaving Confluence. These forms and workflows satisfy the demands of real business applications and provide a rich user experience that is far beyond typical forms-based applications. Nothing needs to be installed on your computer - the designer runs completely in your existing web browser.

What is Live Forms™ Server?

Live Forms™ Server is installed in your environment (we offer a version bundled with Tomcat for easy installation) and provides a whole new level

of capabilities to browser-based forms. Automatic validation, business rules, digital signatures as well as easy integration with databases and other internal business systems. The server is required for Live Forms to function in Confluence.

Form Submissions

Form submissions can easily be integrated with real business applications. Forms can be configured to:

- Use the submission data to create/update Confluence pages.
- Accumulate submission data into an existing Confluence page.
- Send the submission to your email address.
- Store submissions in Live Forms' built-in submissions repository and view them in Confluence.
- Write the submission data to a Google spreadsheet.
- Send the submissions via HTTP to a database connector that can read/write/update your database.
- Send the submissions via HTTP to an endpoint of your choice - the data is available as standard name-value pairs, an XML document and a PDF.

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