

**Confluence Connector Option - v22**



Copyright 2023 ONEPOINT Projects GmbH. All rights reserved.

Planforge Server, Version 22

Planforge and the Planforge logo are registered trademarks in the EU and other countries, Planforge is a trademark of ONEPOINT Projects GmbH.

All company and product names mentioned are trademarks of their respective owners as far as registered.

The optional module "Confluence Connector" allows to synchronize charts of Planforge to Atlassian's Confluence.

## Contents

1. Prerequisites
  - 1.1. For your Planforge server
  - 1.2. For your Confluence server
2. Installation and Configuration
  - 2.1. Planforge
  - 2.2. Confluence - Plugin installation
3. Synchronization of the charts
  - 3.1. WBS chart
  - 3.2. Gantt chart
  - 3.3. Pipeline

# 1. Prerequisites

## 1.1. For your Planforge server

The Confluence Connector Option is available for the server- and cloud-edition of Planforge. For using the Confluence Connector Option Planforge must be upgraded to version 18 or later. Since the Confluence Connector Option is an optional module, it needs to be licensed in your Planforge license.

## 1.2. For your Confluence server

Currently the Confluence Connector Option is only available for the server-edition of Confluence. Your Confluence installation must be upgraded to version 6.13 or later.

# 2. Installation and Configuration

## 2.1. Planforge

As soon as the Confluence Connector Option is included in your Planforge license, you can start with the installation and configuration for using the optional module. For Planforge only the connect URL needs to be included in the configuration file ("configuration.oxc.xml") which can be found in your "Planforge"-folder. The connect URL is the same used to access your Planforge Server, e.g. `<connect-url>http://localhost:8080/planforge</connect-url>`. Please note that these changes only get applied when restarting the Tomcat of your Planforge Server. For the Cloud-edition the connect URL of the Cloud-servers has already been added to the configuration-file by the Planforge Team.

## 2.2. Confluence - Plugin installation

To allow the synchronization of changes made in Planforge, a plugin must be installed on Confluence-side. The plugin can be downloaded via:

<https://downloads.planforge.io/tools/Planforge-Confluence-Connector-1.3.0.obr>

After downloading the plugin, please follow these steps for installing the plugin and configuring the application link:

1. Navigate to the "Manage apps"-section which can be found in the "Confluence Administration".
2. Click on the "Upload app"-button and choose the option "From my computer". Select the plugin which you downloaded previously and click "Upload".
3. Afterwards the plugin should be uploaded. If everything worked correctly, you should see it in the list of "User-installed apps".
4. Navigate to the "Application links"-section which can be found further down in the navigator on the left side of the Confluence administration.
5. Enter the URL of your Planforge Server (e.g. <http://127.0.0.1:8080/planforge> for Server or <https://europe2.planforge.io> for Cloud) and click "Create new link".
6. Confirm the "Configure Application URL"-dialog with "Continue".
7. The login page of Planforge should appear now. Sign on with your administrator account.
8. Afterwards a page with "Link Atlassian Confluence to Planforge" should appear that allows you to confirm the connection by clicking "Authorize".
9. Afterwards the application link should be successfully created.
  1. If the connection could not be established, please contact the Planforge Support-Team.

### 3. Synchronization of the charts

Currently the WBS chart, the Gantt chart and the Pipeline can be synchronized from Planforge to Confluence. The synchronization is a real-time synchronization, which means that changes of these charts will be automatically and immediately synchronized to Confluence. To be able to synchronize these charts to Confluence, please follow these steps:

1. Create a new workspace or use an existing one and create a new page. Please note that the page must be published before you can use the toolbar.
2. Click the "+"-button in the toolbar and select "Other macros".
3. Enter "Planforge" in the search function to only show the supported Planforge macros.
4. Select the macro you would like to include, e.g. "WBS".
5. Afterwards the dialog "Insert 'WBS' Macro" will appear and if it is the first time, an authentication is required.
6. Click on the authentication link on the right side, called "Click here to do so".
7. The dialog "Assign Confluence User to Planforge User" will appear. Click "Authorize" to confirm the authentication.
8. Click on the macro and select "Edit".
9. Now you can enter the parameters on the left side.
10. If the chart is not immediately shown, click on the "Preview"-button. Afterwards you should see a preview of the chart.
11. After confirming the dialog with "Insert" and saving the page, you can see the Planforge macro included in your Confluence page.

#### 3.1. WBS chart

For including the WBS chart in Confluence, you can configure the following parameters:

- Project: You can select projects with the methodology "Traditional" or "Jira". Simple projects are not supported, because they do not contain a WBS chart.
- Outline Levels: In this field you can select if you would like to see all outline levels or just some in the WBS chart.
- View Type: The view types "Simple", "Effort", "Scheduled" and "Progress" can be selected for the WBS chart.
- Status: Additionally, you can select if you would like to see only open or only closed project phases in your WBS chart.

If you selected the parameters once, you can always change them by editing the page, clicking on the WBS-field and on "Edit". Afterwards you are in the "Edit 'WBS' Macro"-dialog where you can change the parameters.

### 3.2. Gantt chart

For including the Gantt chart in Confluence, you can configure the following parameters:

- **Project:** You can select projects with the methodology "Traditional" or "Jira". Simple projects are not supported, because they do not contain a Gantt chart.
- **Time Unit:** In this field you can select "Day", "Week", "Month", "Quarter" and "Year" for the Gantt chart.
- **View Type:** The view types "Simple", "Resources", "Resources Description", "Effort", "Responsible" and "Dates" can be selected for the Gantt chart.

If you selected the parameters once, you can always change them by editing the page, clicking on the Gantt-field and on "Edit". Afterwards you are in the "Edit 'Gantt' Macro"-dialog where you can change the parameters

### 3.3. Pipeline

For including the Pipeline in Confluence, it is not required to configure parameters. Currently the whole pipeline gets synchronized to Confluence.