

Confluence Connector Option - v24



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Planforge Server and Cloud, Version 24.1

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

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1. Prerequisites

1.1. For Planforge

The Confluence Connector Option is available for the server and cloud edition of Planforge.

For using the Confluence Connector Option, Planforge Server 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.

You must also activate the module in Planforge under System Settings > CUSTOMIZE > Options > Confluence Connector Option.

1.2. For Confluence

Currently the Confluence Connector Option is 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 and activated in your Planforge system settings, you can start with the installation and configuration for using the optional module.

2.1.1. Planforge Server

The connect URL needs to be included in the configuration file ("configuration.oxc.xml"), which can be found in your Planforge home folder. The connect URL is the same as the one used to access your Planforge server instance, 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 instance.

2.1.2. Planforge Cloud

You don't need to make any special configurations for the cloud version. You can proceed directly to installing the Confluence Plugin.

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-1.4.0.jar>

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. Click on the "Create new link" button and under "Application URL" enter the URL of your Planforge cloud or server instance (e.g. <https://europe2.planforge.io>, <http://localhost:8080/planforge>).
6. Confirm the "Link Applications" dialog with "Continue".
7. Afterwards a page with "Link Atlassian Confluence to Planforge" should appear that allows you to confirm the connection by clicking "Authorize".
8. Afterwards the application link should be successfully created.

If the connection could not be established, please contact the Planforge Support Team.

3. Synchronization of 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.
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.
6. If it is the first time, an authentication is required. The dialog "Assign Confluence User to Planforge User" will appear. Click "Authorize" to confirm the authentication.
7. Select the project you would like to add, then you can also edit the parameters.
8. If the chart is not immediately shown on the right side, click on the "Preview" button. Afterwards you should see a preview of the chart.
9. 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: You can select if you would like to see only open or only closed project phases in your WBS chart.
- Refresh: Additionally, you can also select how often you would like your chart to reset in minutes.

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.
- Refresh: You can select how often you would like your chart to reset in minutes.

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. As with the other charts, you can pick a refresh time here as well.