

Confluence Connector Option - v18.0.1



ONEPOINT
Projects

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ONEPOINT Projects, Enterprise Edition, Version 18.0.1

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

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1. Pre-requirements

1.1. For your ONEPOINT Projects

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

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

2.2. Confluence - Plugin installation

To allow the synchronization of changes made in ONEPOINT, a plugin must be installed on Confluence-side. The plugin can either be requested via the ONEPOINT Projects Team or alternatively, it can be found and downloaded via Atlassian's Marketplace at:

<https://marketplace.atlassian.com/apps/1220065/onepoint-projects-confluence-integration?hosting=server&tab=overview>

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 ONEPOINT Server (e.g. <http://127.0.0.1:8080/onepoint> for Server or <https://europe2.onepoint-projects.com> for Cloud) and click "Create new link".
6. Confirm the "Configure Application URL"-dialog with "Continue".
7. The login page of ONEPOINT Projects should appear now. Sign on with your administrator account.

8. Afterwards a page with "Link Atlassian Confluence to ONEPOINT Projects" 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 ONEPOINT Projects Support-Team.

3. Synchronization of the charts

Currently the WBS chart, the Gantt chart and the Pipeline can be synchronized from ONEPOINT Projects 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 "ONEPOINT" in the search function to only show the supported ONEPOINT Projects 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 ONEPOINT 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 ONEPOINT Projects 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.