Integration: Confluence

Content

Overview

Confluence is a business wiki used for documentation and project planning, either cloud or self-hosted, from Atlassian, the creators of JIRA and several other products. For further information about the features and capabilities of Confluence please visit the Atlassian website.

Features

The integration with **dynaBOARD** allows the following features:

- Activate page "Documents" for your customers (per-customer level)
- Add access to specific Confluence pages for your customers (per-customer level)
- Preview documents from Confluence in **dynaBOARD** (as partner user)
- Allow your customers to list, search, filter and view the documents you have give them access to
- dynamic link conversion for linked Confluence pages and JIRA links (see "Content filtering explained" below)

Requirements

In order to connect **dynaBOARD** with Confluence, you need the following:

- installed Confluence Server or active Confluence Cloud instance
- installed **dynaBOARD** Server or active **dynaBOARD** Cloud instance
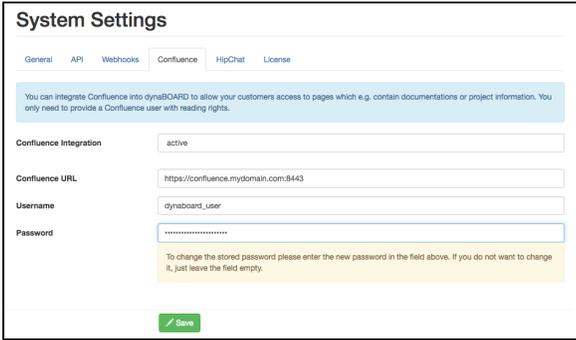- a Confluence user for the connection (rights requirements see below)

Setup

Setup in Confluence

The setup in Confluence is very easy. You need a Confluence user which has only read rights. You can choose a user which has also creating/editing rights, but this is not necessary at the moment.

In the future we might add functions to the Confluence integration which demand more rights, but currently reading rights is sufficient.

Setup in dynaBOARD

Log in to **dynaBOARD** (with your partner user, not the admin user), and go to **Settings**. Then click on the tab **Confluence**.

Select "active" under **Confluence Integration**. Several fields and options will now show up.

Enter the following information into the fields:

- **Confluence URL**: enter the url of your Confluence instance (cloud or server version), including port if required
- **Username**: enter the username (not the email address!) of the Confluence user you want to use for the connection
- **Password**: enter the corresponding password of the Confluence user

> ⚠️ **Important**
>
> If you want to connect to Confluence cloud (not server version), please add the following at the end of the url:
>
> /wiki
>
> This is needed for the API path, so for example if your Confluence url is
>
> https://mycompany.atlassian.net
>
> please enter
>
> https://mycompany.atlassian.net/wiki
>
> into the url field.

After that, click on **Save**. If all works well, you should get a positive response.

Proceed to "Settings", below.

If an error occurs during connection setup, please check the following before contacting our support team:

- does the user has sufficient rights for the required actions?
- is the url correct? (just the base url, do not include any path)
- is the username/password combination correct?

Settings

There are no specific settings in this area for the integration.

To allow a customer to see the document menu tab, and assign documents from Confluence to him, head over to Customers. Once set up there, a new menu item will appear for the customer users on the left hand, named "Documents". See the User Guide for a description of this page.

Content filtering explained

The pages from Confluence will be delivered on-demand as a stripped-down HTML page, provided by Confluence API. The pages in **dynaBOARD** will look a bit tuned down compared to the ones in Confluence, as the styling in both systems are different. The content, thought, stays mostly unchanged - with the following exceptions:

All links will be analyzed. If it is an external link (i.e. destination is a regular website, but not Confluence or JIRA), it remains unchanged.

If the link is a Confluence link, **dynaBOARD** will try to convert it to a link through which the content will be displayed in **dynaBOARD** when clicked on it - redirecting your customers to Confluence would not be desirable, as they usually do not have access to it (apparently, as you are using **dynaBOARD** for sharing documents with them). **dynaBOARD** will check if the destination page is allowed for the customer to view - if you made it accessible on the customer editing page, it will be linked. If not, the link will remain, but clicking on it will do nothing.

If the link is a JIRA link (i.e. the base url is the same as the JIRA instance you connected **dynaBOARD** to), it will convert the link to a view issue link for **dynaBOARD**. If the customer does not have access to the project associated with the issue, he will get a message once he clicks on it.

Dynamic fields (e.g. search form fields) will be removed, if possible, or remain without function. This also relates to issue lists from JIRA, which are generated dynamically on-demand - unfortunately the Confluence API does not deliver them.

Regular images should be displayed as expected, if not provided by some addon through external sources.

As you can see, it is advisable to avoid some elements (e.g. forms or dynamic issue tables) in the pages you want to provide to your customers, as they will not be displayed properly or will not function as expected.

Good to know

Things you should know about the integration:

- Access to documents is a customer right, so all users of a customer will have access to the documents associated with the customer. It is not possible to allow documents to be browsed /viewed for some users of a customer, but not for others.
- If you remove rights from the Confluence user from within Confluence, or change the username or password, the connection between Confluence and dynaBOARD will fail.

Common connection issues

If you are having trouble connecting to your Confluence instance, please check the following:

- check if the url is correct, especially if connecting to Confluence Cloud (see above, add "/wiki" to path). Also, make sure you are using https (SSL), else the connection to the Atlassian Cloud might fail.
- make sure you are using the "Username" for the Confluence user, not the email address. You can find the username in the Confluence user management, in the column "Username".
- check if API remote calls are enabled: https://confluence.atlassian.com/doc/enabling-the-remote-api-150460.html