



i-doit pro Confluence Export Add-on

Version 1.2.0

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Confluence Export Addon for i-doit

The Confluence Export Addon allows you to generate a document in i-doit via the document addon and transfer it to Confluence. When objects are edited in i-doit, the Confluence page is automatically updated.

1. Installation & Configuration

1.1 Prerequisites

- i-doit \geq 33
- Confluence Cloud or Confluence On Premise \geq 7.1
- i-doit-Addon Documents (fee-based)

1.2 Installation

The add-on "Confluence Connector" must be installed via the admin mask in i-doit.

1.3 Setup

Under Add-ons -> Confluence Connector, the connector can be configured.

- Enter the Confluence URL:
 - For cloud e.g. <https://sectornord.atlassian.net>
 - For On Premise e.g. <https://confluence.example.com>
- It is recommended to create a new user (e.g. "i-doit") for the connector in Confluence and use it for the interface.
- Enter the user's username and password in the configuration.
 - For Cloud: User's email address and the API token (see below)
 - For On Premise: Username and Password
- Click Save and "Test Connection" at the top. A success message should appear.

If the connection could not be established, check the settings. (See also: "The Confluence Server is unavailable")

Note: After too many incorrect login attempts, the API user must first log in via the Confluence website and solve the captcha.

Confluence Connector Konfiguration

Confluence URL:

Confluence API Benutzer:

Confluence API Passwort:

API Kommunikation in Logdatei speichern:

Confluence Space Schlüssel:

Confluence Eltern-Seite ID:

Bestimmte Felder nicht aktualisieren:

Suchmuster	Ersetzungsmuster
1. <input "="" i-doit="" type="text" value="src="/>	<input "="" 192.168.18.70="" http:="" i-doit="" type="text" value="src="/>
2. <input "="" images="" type="text" value="src="/>	<input "="" 192.168.18.70="" http:="" i-doit="" images="" type="text" value="src="/>

Confluence Titel:

Confluence connector settings

Create API tokens in Confluence

For the cloud version of Confluence, an API token is required.

- Log in to the Atlassian dashboard: <https://id.atlassian.com/manage-profile/security/api-tokens>
- It is advisable to create your own interface user who can create the pages via the API.
- Click Create API Token.
- Set a name and the validity of the token.

Save API communication to log file

Creates a log file with all API requests and responses. This file can be helpful for troubleshooting problems. Location: </var/www/html/i-doit/log/confluence-connector.log>

Configure Confluence Space

Here you have to enter the default space key from Confluence. This usually consists of a few capital letters and is displayed in the URL when you call up the space in Confluence.

Example cloud: <https://sectornord.atlassian.net/wiki/spaces/Notfall/overview> → space key = **emergency**

Example On Premise: <https://confluence.example.com/display/NOT/Notfallhandbuch> → Space-Key = **NOT**

You can also set the space key individually for each document if you create and fill in a custom "Confluence Space" field in the document template. (See "Define Confluence space and parent page individually for each document")

Configuring the Confluence Parent Page

This setting is optional.

Enter the default page ID of a subpage in the space defined above so that the interface creates the page as a subpage.

You can find the page ID in the URL in Confluence or by clicking the three dots in the top right corner and then clicking Page Info or Content Information. The ID will then be displayed in the URL.

Example cloud: <https://sectornord.atlassian.net/wiki/spaces/Notfall/pages/123456/Notfallhandbuch> –
> page ID = 123456

Example On Premise: <https://confluence.example.com/pages/viewpage.action?pageId=123456> →
Page ID = 123456

You can also set the value individually for each document if you create and fill in a custom field "Confluence Page" in the document template. (See "Define Confluence space and parent page individually for each document")

Prevent automatic updating of certain fields

- Enter the i-doit fields here, which should not lead to an update in Confluence. The internal field name must be used. Several fields can be entered one below the other.
- Example: "firmware" - All fields that contain "firmware" and are changed by the user do not lead to a refresh of the page in Confluence.
- An entire category can also be excluded: "isys_cmdb_dao_category_g_drive" - All fields of the "Drive" category do not lead to an update of the object in Confluence.
- To find out the label for the fields, the regex debug mode must be activated. To do this, a question mark "?" must be entered as a regex filter. Then, whenever a field is changed, the internal name of the field is displayed in a notification.

Update documents from linked objects

- In some cases, it may be useful to update not only the documents of the edited object, but also the documents of linked objects. For example, if the software version changes, the server document associated with the software should also be updated.
- Select all object types for which the documents of linked objects should be updated, e.g. application, person, location, etc.
- Check the shortcuts via the CMDDB Explorer (in the left bar, above the Categories, click on the blue icon).
- Only documents from directly linked objects are updated, not from objects further away.

Regex Filter

(Optional) Regex filters can be entered here that modify the generated HTML before saving it to Confluence. Enter the regex expression first, followed by the text you want to replace the regex expression with. Several filters can be entered one below the other. For examples, see "Defining Regex Filters".

Configure Confluence titles

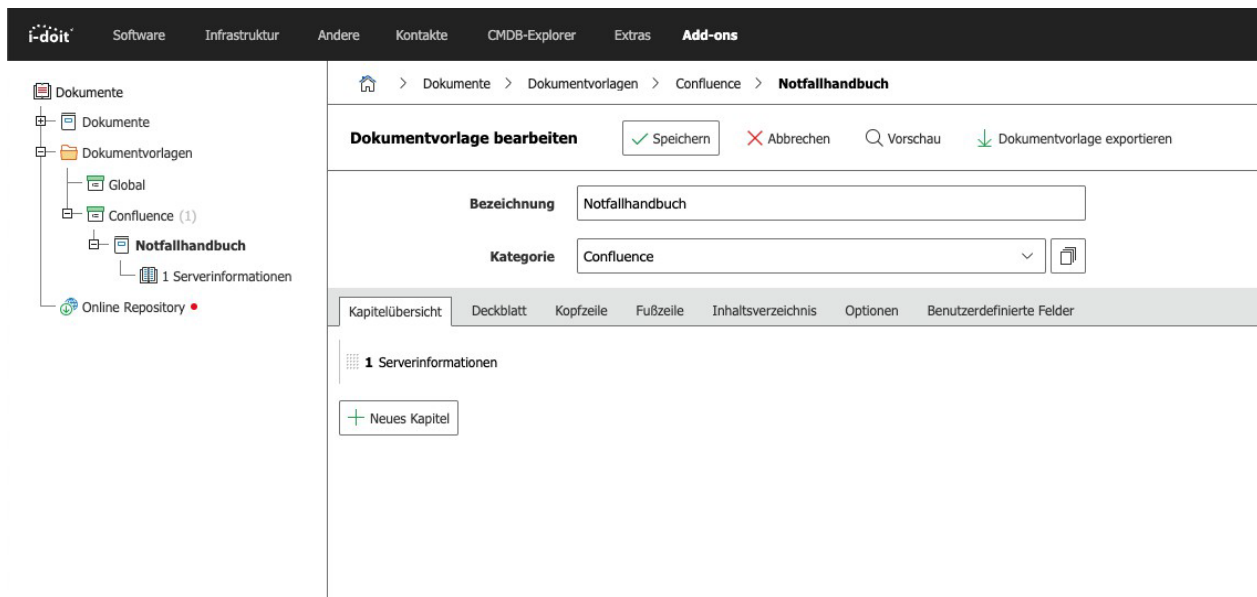
Specifies which components are used to generate the object title in Confluence.

2. Document template and document creation

To generate a Confluence page, an i-doit document must exist for the object.

2.1 Create a document template in the document addon:

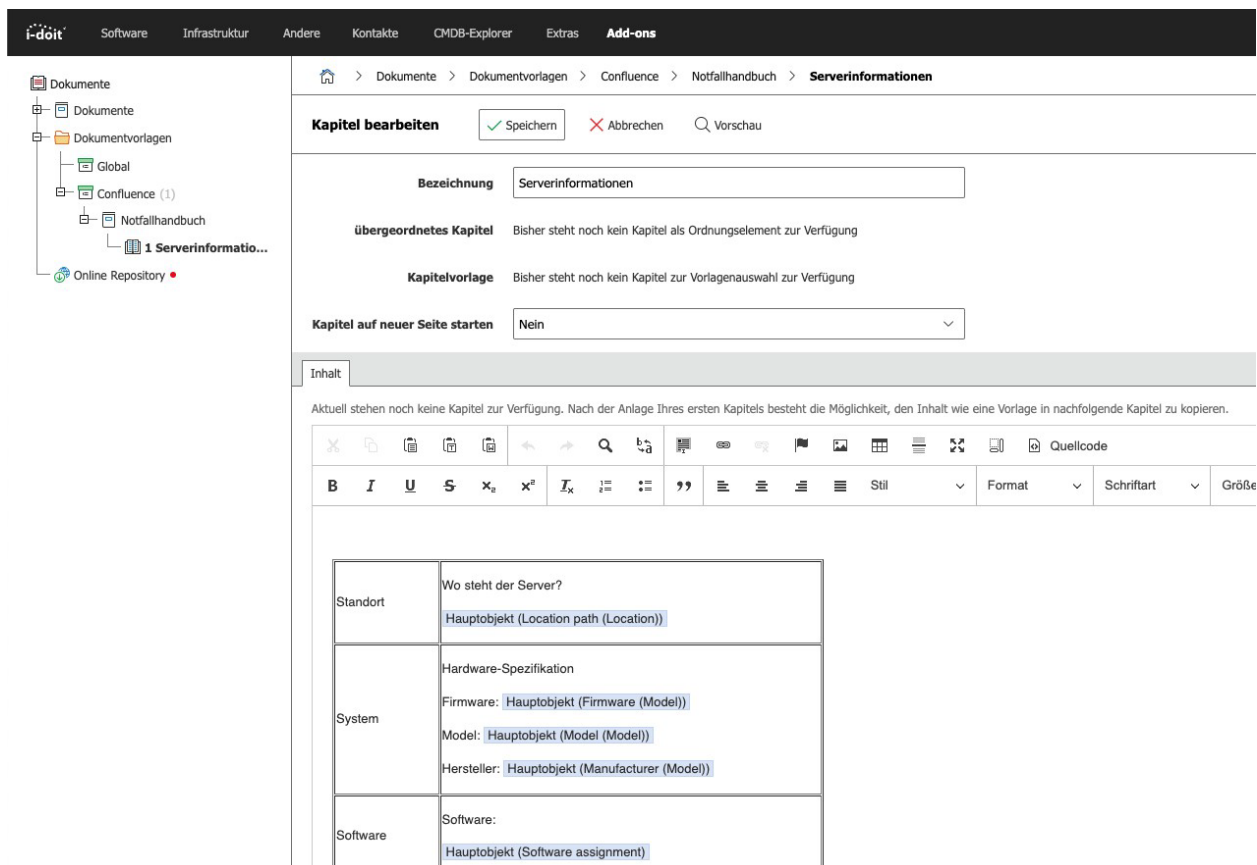
The template can be created in the "Global" category or in a separate category.



Create a template

2.2 Create at least one chapter:

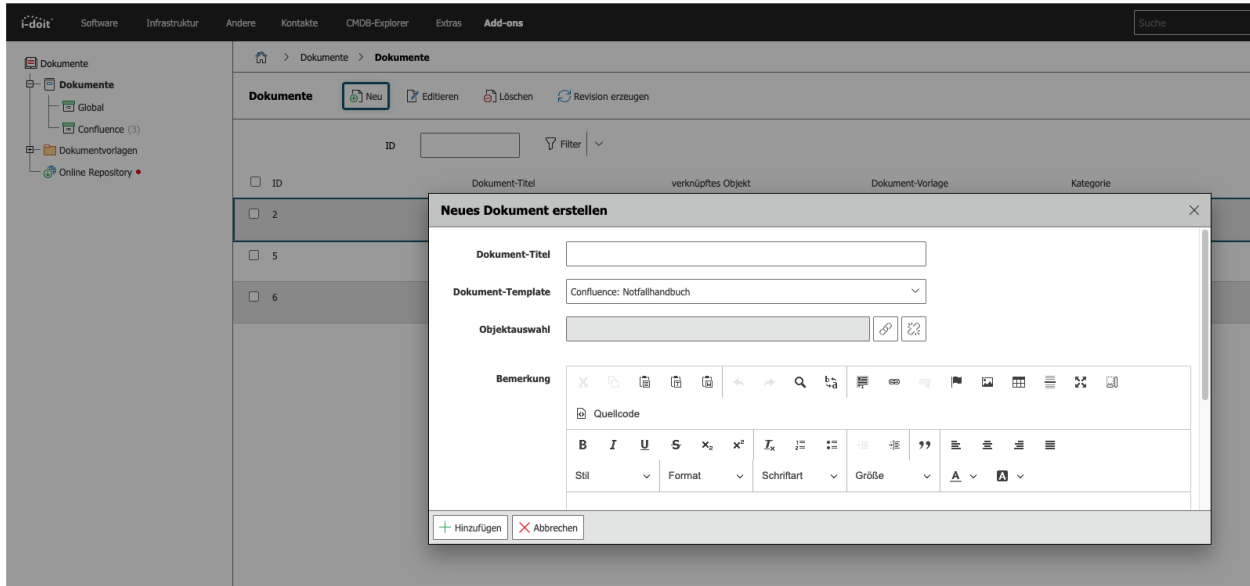
An example chapter can be found below.



Create chapters

2.3 Create a document for the template and an object:

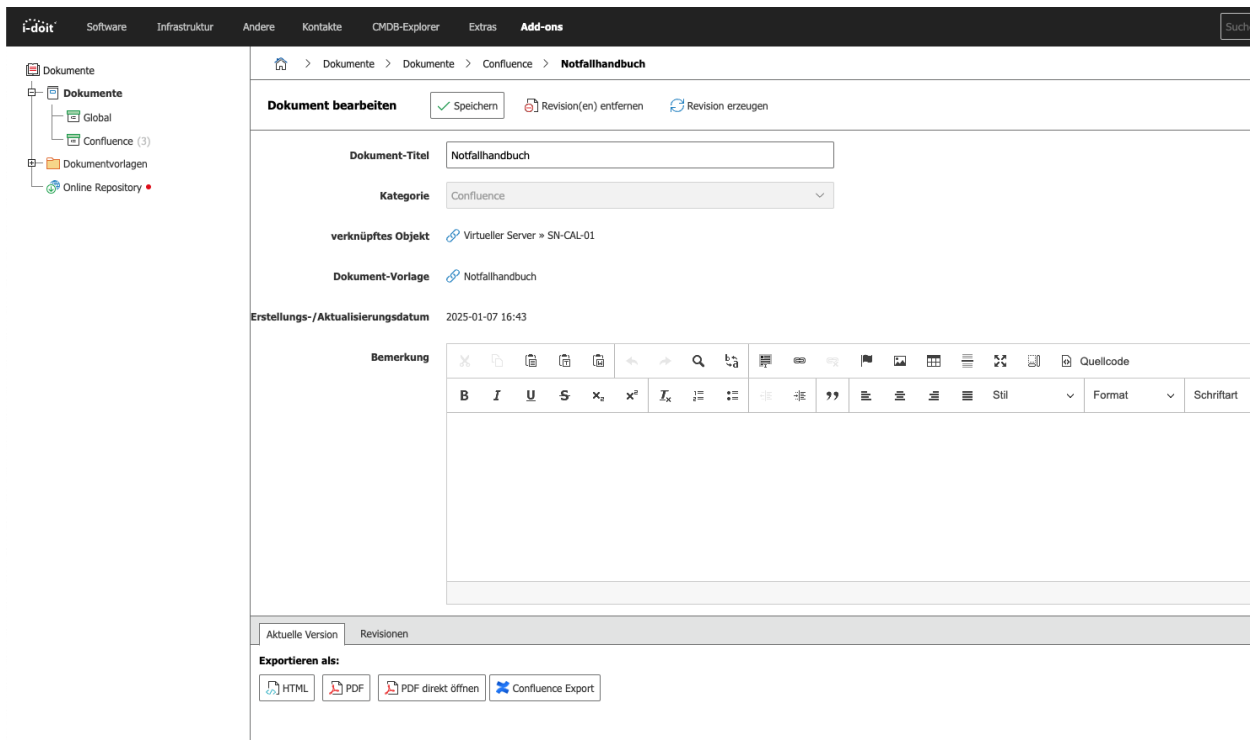
You can also generate a document for several objects at the same time.



Create Document

2.4 Export the document to Confluence:

Press "Confluence Export" at the bottom. A Confluence page is created or updated.



Export document

If the document has been successfully exported, this is confirmed by a success message.

The screenshot shows a Confluence page for a document titled "SN-CAL-01 - Notfallhandbuch". The page content is as follows:

Standort	Wo steht der Server? > Server-Raum A
System	Hardware-Spezifikation Firmware: - Model: VMware7,1 Hersteller: VMware, Inc.
Software	Software-Zuordnung:
Netzwerk	Adresse: 172.25.64.59 Netz: Global v4 FQDN: sn-cal.intern Hostname: sn-cal
Link zu i-doit	https://cmdb.example.com/i-doit/?objID=26

Below the table, there is a "Gefällt mir" button and a "Kommentar schreiben" input field.

Confluence - page

3. Generate and update a Confluence document

3.1 Different ways to create a Confluence page:

1. Via the **interface of the document addon** (overview or detail view) -> Confluence page is **created or updated**
2. In the **object category "Documents"** via the "Confluence" button > Confluence page, **created or updated**
3. **Automatically** when editing an object - > Confluence page is only **refreshed, but not recreated** (See 3.2)
4. The **console command** -> Confluence page is **created or updated** (See 5.)

Remarks

- The area in which the Confluence page is created depends on the configuration. See "Setup".
- If there is already a page with the same name in the defined Confluence space, this page will be updated.
- Editing an i-doit object only refreshes the Confluence page, not creates it. See Automatically update the Confluence page.
- Each time you export to Confluence, a new revision of the document is created. You can prevent this by using the advanced configuration. See Update Confluence page only when the document is actually modified.

3.2 Automatically refresh the Confluence page

- When the object is edited, e.g. a field is changed, a new revision is automatically created and the Confluence page is updated.
- However, a document must have already been created beforehand via the "Confluence Export" button .
- If a document doesn't already have a Confluence page, Edit doesn't open it

of an object. This prevents Confluence pages from being created for all i-doit documents, as there may be i-doit documents for this object that should not be exported to Confluence.

Attention: If objects are changed frequently, a new revision will be created in Confluence each time. This can be prevented by the configuration. See: "Refresh Confluence page only when the document is actually modified."

3.3 Move or delete Confluence pages

If a Confluence page has been renamed or deleted, the interface will no longer recognize it. Then, if someone edits the i-doit object, the Confluence page will no longer update automatically. It also doesn't create a new page. To recreate the page, the "Confluence Export" button must be used once in the i-doit document or the document must first be generated via the console.

If a Confluence page has been moved to a different location in the same area, the interface will continue to refresh that page. However, the page is not moved automatically. However, newly created Confluence pages are created in the configured area and parent page (see "Other settings").

4. Advanced settings

The Confluence connector offers some additional setting options to adapt the generation of the Confluence page to individual needs. These settings are optional.

4.1 Defining Regex Filters

To ensure that the i-doit documents are displayed correctly in Confluence, regex filters can be used. The following filters are recommended:

Convert internal links

This regex automatically replaces internal links to i-doit pages with the link to your own i-doit system so that it can be reached by Confluence.

Search pattern: `src="/i-doit/`

Replacement pattern: `src="http://i-doit.example.com/i-doit/` (insert URL to your own i-doit system)

Convert links to images

This regex extends the previous regex for images. Search pattern:

`src="/images/`

Replacement pattern: `src="http://i-doit.example.com/i-doit/images/` (insert URL to your own i-doit system)

Convert Dynamic Links

The document addon cannot include an object ID in the href parameter, e.g. ``. This issue can be worked around by using the following regex filter:

Search pattern: `<a>(.*?)` Replacement pattern: `$1 `

The following HTML structure must then be used in the document template:

```
<a>https://i-doit.example.com/i-doit/?objID=<span class="document-wysiwyg-placeholder" data-  
{ "widget_type": "masterObject", "type": "property", &qu  
{ "catg": "C CATG GLOBAL", "catg_type": "g", "p  
(General)", "objID": null, "showOnlyPrimaryEntry": false }>Master objec
```

Don't remove script tags and Confluence macros

Note: Macros in Confluence only work on Confluence on-premise. Script and macro tags are

removed on the way from the i-doit template to the Confluence page.

In order for these tags to be preserved, the tags must be "defused" and then brought back to their original form with a regex filter.

The use of scripts is only possible in the Confluence Data Center.

Confluence Cloud blocks the use of scripts through its own security policies.

Example script tag:

Here, the angle brackets are replaced by `<|` and `|>` so that they are not removed. With a regex filter, they can then be brought back to their original shape.

```
<|ac:structured-macro ac:name="html"|>  
  <|ac:plain-text-body|>  
    <|! [CDATA[  
      <|script|>  
        console.log("test | 23");  
      <|/script|>  
    ]]|>  
  <|/ac:plain-text-body|>  
<|/ac:structured-macro|>
```

Attention: There must be no line breaks between the tags, otherwise i-doit will insert `<p>` tags there. These are automatically removed if you proceed as follows:

- Open template in i-doit
- Click on Source in the upper right corner
- Paste the code as above
- Click on Source in the upper right corner to switch back to the normal view
- Then click on Source again to check the code. There should be no additional `<p>` tags.
- Save

For example, in the source code, the HTML should now look like this: `<p><|ac:structured-macro ac:name="html"|> <|ac:plain-text-body|> <|! [CDATA[<|script|> console.log(" test | 23"); <|/script|>]]|> <|/ac:plain-text-body|> <|/ac:structured-macro|> </p>`

Next, configure the regex filters in the addon settings:

- `<| => <`
- `|> => >`

The best way to check whether the script tag has arrived correctly in Confluence is in the browser console. The output "test|23" should appear there when the page is accessed in Confluence (not in editor mode).

Example Confluence macro:

```
<|ac:structured-macro ac:name="children" ac:schema-version="2" /|>
```

The regex filters:

- <| => <
- |> => >

4.2 Define Confluence space and parent page individually for each document

You can also specify the Confluence space and the parent page individually for each document. To do this, navigate to the document template in the document add-on and then to the "Custom fields" tab. There you create two fields of type "Text field" with the names "**Confluence-Space**" and "**Confluence-Page**". These fields must then be filled in in the document. Make sure that the parent page actually exists in the defined space, otherwise an error will occur.

If the parent page is configured, but the Confluence page already exists under another parent page, the page will not be moved. The existing page will be updated.

The screenshot shows the i-doit interface for editing a document. The breadcrumb navigation is: Home > Dokumente > Dokumente > Confluence > Notfallhandbuch. The document title is 'Notfallhandbuch' and the category is 'Confluence'. The 'Confluence-Space' field is set to 'NOT' and the 'Confluence-Page' field is set to '360496'. Other fields include 'Dokument-Titel', 'Kategorie', 'verknüpftes Objekt', 'Dokument-Vorlage', and 'Erstellungs-/Aktualisierungsdatum'.

Custom Fields

4.3 Update Confluence page only when the document is actually changed

Confluence creates a new version every time the site is updated, even if nothing has changed. However, the content of the page is partially changed by Confluence (HTML processing), which means that a review of actual changes is only possible on the i-doit page.

Enable verification :

A new custom field "**Confluence Hash**" must be created in the document template. This field is automatically populated with a hash value and compared with a new hash value each time the document is updated. If the hash value hasn't changed, the Confluence page won't update.

Feldbezeichnung	Feldtyp	Aktion
<input type="text" value="Confluence-Space"/>	Textfeld <input type="text" value="Textfeld"/>	<input type="button" value="X Entfernen"/>
<input type="text" value="Confluence-Page"/>	Textfeld <input type="text" value="Textfeld"/>	<input type="button" value="X Entfernen"/>
<input type="text" value="Confluence-Hash"/>	Textfeld <input type="text" value="Textfeld"/>	<input type="button" value="X Entfernen"/>
<input type="button" value="+ Neues Feld hinzufügen"/>		

Custom Fields

The synchronization does not take place when the document is created in the document overview via the Confluence button. Here, the page is always updated, even if nothing has changed. This always ensures that the page in Confluence is synchronized with the document in i-doit.

5. Generate Document from Console

Documents can also be generated via the i-doit console script and exported to Confluence.

All you have to do is enter the object ID or document ID. The document ID can be found in the URL when you open the document (e.g.: `? moduleID=1035&pID=documents&action=edit&id=7 => document ID = 7`).

```
cd /var/www/html/i-doit
./console.php --user=admin --password=admin confluence --object=68537

./console.php --user=admin --password=admin confluence --document=7
```

If you specify an object ID, all documents that exist for this object will be exported.

6. Sample Template

The source code for a simple template could look like this. In the text editor, click on "Source Code" in the upper right corner to insert the HTML code there.

```
<p><strong><span style="font-size:24px;">Emergency Manual</span></strong></p>

<table border="1" cellpadding="1" cellspacing="1" style="width:500px;">
  <tbody>
    <tr>
      <td>location</td>
      <td>
        <p>Where is the
server?</p>

        <p><span class="document-wysiwyg-placeholder" data-widget-type="masterObject" d
          {"widget_type":"masterObject","type":"property",&qu
            {"catg":"C CATG LOCATION","catg_type":"g"," path
              (Location)","objID":null},"showOnlyPrimaryEntry":false}">Haupto

        </td>
      </tr>
    <tr>
      <td>system</td>
```

```
<td>
<p>Hardware Specification</p>

<p> firmware:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG MODEL","catg_type":"g","pr (Model)","objID":null},"showOnlyPrimaryEntry":false}>
main object (F

<p>Model:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="ma
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG MODEL","catg_type":"g","pr (Model)","objID":null}}>Model</span></p>

<p>Manufacturer:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG MODEL","catg_type":"g","pr (Model)","objID":null}}>Manufacturer
(Model))</span></p>

</td>
</tr>
<tr>
<td>Software</td>
<td>
<p>Software Mapping:</p>

<p><span class="document-wysiwyg-placeholder" data-widget-type="masterObject" d
assignment","optHeader":false,"headerBackground"::"#ffffff&quo; [{"g":{"C
APPLICATION":["80","\,"application\&q
["2"],"isConditionalMessage":false,"conditionalMessageEmpty":&

</td>
</tr>
<tr>
<td>network</td>
<td>
<p>Address:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="
(host address)","objID":null,"optHeader":false,"headerTextAlignm (Host Address (Host
Address))</span></p>

<p>net:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="mas
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG IP","catg_type":"g","prop&q (host address)","objID":null}}>Main object (network
(host address))</span></p>

<p>FQDN:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="ma
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG IP","catg_type":"g","prop&q (FQDN) (host address)","objID":null}}> Main Object
(Hostname (FQDN) (Hostadre

<p>Hostname:&nbsp;<span class="document-wysiwyg-placeholder" data-widget-type="
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG IP","catg_type":"g","prop&q (host address)","objID":null}}>Main Object (Hostname
(Host Address))</span><
```

```
<p>&nbsp;</p>
</td>
</tr>
<tr>
<td>Link to i-doit</td>
<td><a>https://i-doit.example.com/i-doit/?objID=<span class="document-wysiwyg-place
{"widget_type":"masterObject","type":"property",&qu
{"catg":"C CATG GLOBAL","catg_type":"g","p
(General)","objID":null},"showOnlyPrimaryEntry":false}>Master objec

</tr>
</tbody>
</table>
```

You can also see the document in the i-doit document preview. To do this, click on "Preview" at the top.

[Sample Template](#)

7. Bug fixes

7.1 The Confluence server is unavailable

If the address has been configured correctly, there may be a problem with the firewall or network. Check the reachability of the Confluence server with the curl command:

Cloud: `curl https://<Cloud instance>.atlassian.net/wiki/api/v2/pages`

Server: `curl https://<Confluence server>/rest/api/content`

When using https, it may be necessary to add the `-k` parameter to ignore certificate errors.

As a result, a JSON should be output, such as `{"results":`

```
[],"start":0,"limit":25,"size":0,"_links":{"self":"http://<Confluence-
Server>/rest/api/content","base":"http://<Confluence-Server>","context":""}}.
```

More information about the communication can be found with the parameter `-`

`v`.

7.2 Error message: "Error: 401 Unauthorized"

The login details are incorrect. Please check the settings. Or the user has been blocked because too many false login attempts have been made. In this case, the user must first log in via the Confluence website and solve the captcha.

7.3 When generating an i-doit document, the object cannot be selected

Only one document can be created for objects if the "Document" category is activated for this object type. Check the settings in i-doit: Administration -> Database -> Edit Data Structure -> Object Type Group "Infrastructure" -> Select Object Type -> Customize -> Document category.

7.4 Changing an object does not generate a Confluence page

- An i-doit document must exist for the object. Click on "Add-ons" > "Documents" to create a document.
- A Confluence page must already exist for the document. Generate the Confluence page via the "Confluence Export" button in the document view. Only then will the page be updated automatically. For more information, see Automatically update the Confluence page.

- Make sure that the document has actually been modified if you use the custom field to review changes. For verification, you can manually empty the field with the hash. The page will then be updated in any case during the next comparison. See also: "Update Confluence page only when the document is actually modified."
- The category must not be excluded in the Confluence connector settings. See: "Prevent automatic updating of certain fields".
- If you want to refresh the page from a linked object, the object type of the modified object must be selected in the Confluence connector settings. Check the shortcuts via the CMDB Explorer (in the left bar, above the Categories, click on the blue icon).

7.5 An API error message appears when generating a Confluence page

- For error **401** Unauthorized, check the credentials.
- In the case of error **404** or **500** Internal Server Error, check whether the defined page ID actually exists in the defined space.
- API logging can help with other error messages.
- Enable logging in the Confluence connector settings (add-ons -> Confluence connector) and check the log file. This can be found under </var/www/html/i-doit/log/confluence-connector.log>.

7.6 Error message: Response code: 400; Error parsing xhtml: String ']]>' not allowed in textual content,

The template contains tags that are not accepted by Confluence. Common cause of errors: Tags crept in between the script or macro tags after saving `<p>` . These are automatically added if there is a line break between the tags. To prevent this, the code must be inserted into the source code editor and then switched to the normal editor and back to the source code/source editor. See also under "Example Script Tag".

If the error still occurs, you can enable logging in the Confluence settings and check the API communication in the log. It contains the request that was sent to Confluence. This contains the raw HTML code, which presumably contains missing and incorrect HTML tags, such as: `<p>` tags.

7.7 In Confluence, only HTML code is displayed

The HTML macro may be disabled.

- View Confluence settings
- Select "Manage apps" links
- Select "System" from the filters in the drop-down
- Expand "Confluence HTML Macros"
- Activating the "html" module

Changelog

1.0.0

- Init i-doit-Confluence-Connector

1.0.1

- Added compatibility with 8.2
- Improved error handling

1.0.2

- Improved regex config

1.0.3

- Bugfix in configuration

1.0.4

- Bugfix in javascript module path

1.0.5

- Fixed deletion of regex filter in configuration
- Improved documentation

1.0.6

- Improvements for regex definition
- Fixed documents without objects
- Improved documentation

1.0.7

- Added support for custom fields to define space and parent page per

document 1.1.0

- Added support for Confluence Cloud
- Added link to confluence page in notification
- Added Confluence export Button to document overview page

1.2.0

- Fixed changing contact assignment role not triggering export
- Added option to change order of regex filters in configuration
- Added console command to update specific document by id
- Script tags and Confluence makros can now be included in the template
- Check if document changed before exporting to confluence
- Update confluence page if a linked object was changed