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Coveo Platform 7.0

Atlassian Confluence Connector Guide

**Notice**

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# Atlassian Confluence Legacy Connector


**Deprecated**

The Coveo Legacy connector for Atlassian Confluence allows Coveo administrators to index and integrate the content of Confluence Wiki sites and spaces into the Coveo unified index, making it easily searchable by end-users.

**Note:** **CES 7.0.8225+ (March 2016)** A second-generation Confluence connector is now available for Atlassian Confluence 5.7.x to 6.0.1 on-premises installations . For versions supported by both connectors (5.7.x to 5.8.5), it is strongly recommended to use the latest one since the second version of the connector supports the incremental refresh and has significantly better crawling performance, among other things.

## Connector Features Summary

Features	Supported	Additional information	
Confluence version	5.5 to 5.8.5 and Cloud		
Searchable content types		Spaces, pages (such as Wiki pages), blog posts, comments on pages and blog posts (included as metadata), and attachments (in pages, blog posts, and comments)	
Content update	Incremental refresh		
	Full refresh		Rebuild needed to apply space name changes (if any) to all space pages.
	Rebuild		

Features	Supported	Additional information
Document-level security		<ul style="list-style-type: none"> <li>Requires the Coveo plug-in for on-premises Confluence instances.</li> <li>Not supported for Confluence Cloud</li> </ul>

## Features

The Confluence connector features are:

- Extraction and indexing of all Confluence item types:
  - Spaces
  - Wiki pages
  - News items (blog posts)
  - Comments
  - Attachments (binary documents)
- Extraction and indexing of document permissions (supports LDAP integrations, including Active Directory).
- Extraction and indexing of labels.
- Supports the Confluence security model by indexing document permissions (for on-premises deployments when the plugin is installed) so that in Coveo search interfaces, a user searching Confluence content only sees the content to which he has access in Confluence.

**Note:** The Coveo search interface includes a Quick View of Confluence content and provides Confluence specific facets based on spaces, object types (Page, Comment...), and labels.

## Limitations

- The Confluence connector does not support incremental refresh. A source full refresh is required to update the source content.
- If you change the name of a space in Confluence, a full refresh detects the change only for pages created or modified following the change. You must rebuild the source to get the space name change on all space pages.

## What's Next?

Review the steps to deploy the Confluence connector (see [Atlassian Confluence Legacy Connector Deployment Overview](#)).



# Atlassian Confluence Legacy Connector Deployment Overview

The following procedure outlines the steps needed to deploy the Confluence connector. The steps indicate the order in which you must perform configuration tasks on both the Confluence and Coveo servers.

## To deploy the Confluence Legacy connector

1. Validate that your environment meets the requirements (see [Atlassian Confluence Legacy Connector Requirements](#)).
2. On your Confluence server:
  - a. Enable the Confluence remote API.

The Confluence connector requires the Confluence SOAP remote API (Web service) to be enabled on your Confluence server (see the Atlassian document [Enabling the Remote API](#)).

- b. For an on-premises deployment, optionally install the Coveo plugin.

With Confluence version 3.5.0, 4.x, and 5.8.5 installations, when you want to index permissions, you must install the Coveo Confluence plugin on your Confluence server (see [Installing the Coveo Plugin for Atlassian Confluence](#)).

**Note:**

- Indexing permissions associated with each Confluence object is recommended as it allows the Coveo search interface to only show Confluence documents to which the end-user performing the search has access in Confluence.
- Because you cannot install the Coveo Confluence plugin in Confluence On-Demand, Coveo cannot index permissions for this content.

## 3. On the Coveo server:

## a. Create a user identity.

When you want to index permissions, when your Confluence server does not allow anonymous users to access the SOAP remote API, or when you want to crawl using a specific Confluence user, you must create a user identity and set up your Confluence source to use this user identity (see [Adding a User Identity](#)).

With Confluence version 3.5.0, 4.x, and 5.8.5 installations, when you want to index permissions, a user identity is also required and it must refer to a Confluence administrator account.

**Note:** When configuring the source, you must use the credentials of a native Confluence user. Users managed by other identity providers such as Google are not supported.

## b. When you want to index permissions, create a security provider.

For all on-premises supported Confluence versions, when you want to index permissions, you must configure a security provider (see [Creating a Security Provider for the Atlassian Confluence Legacy Connector](#)).

- c. Configure and index the Confluence source.

The Coveo connector needs to know details about your Confluence installation to be able to index its content (see [Configuring and Indexing an Atlassian Confluence Source With the Legacy Connector](#)).

4. In the Interface Editor, consider adding Confluence specific items to your Coveo .NET Front-End search interface:

- a. Add the built-in Confluence facets.

CES comes with three built-in Confluence facets (**Space, Type, Label**) that you can add to your search interface so that end-users can more easily refine Confluence content in search results (see [Managing Built-in Facets and Related Results Appearing in a .NET Search Interface](#)).

- b. Add the **Confluence Labels** display field.

In the search results, you can make the **Confluence Labels** value appear for each Confluence document using the `syscflabels` field (see [Adding Display Fields to Search Results With the .NET Interface Editor](#)).

- c. Integrate a Coveo .NET search interface in Confluence

You can replace the Confluence search page by a Coveo search interface (see [Integrating Coveo .NET Search UI in Confluence](#)). This is particularly useful when your Coveo index contains several other sources, bringing this content into Confluence through the search interface.

- d. Add a Confluence security provider to an outside Confluence search interface

When a Coveo .NET Front-End search interface used to search for Confluence content is not integrated in Confluence, you must add a security provider to the search interface to allow each user to log in to the search interface with their Confluence credentials, and then be able to see, in the

search results, the secured Confluence content for which they have read permissions.

# Atlassian Confluence Legacy Connector Requirements

Your environment must meet the following requirements to be able to use the Coveo Legacy connector for Confluence:

- Coveo license for the Confluence Legacy connector

Your Coveo license must include support for the Confluence Legacy connector to be able to use this connector.

- Confluence versions:

The connector supports Atlassian Confluence installations using the Confluence SOAP remote API (Web service).

- Supported versions:

- Cloud

## Notes:

- Supported as long as the Confluence SOAP remote API is available for Confluence Cloud.
- The connector cannot index document level permissions, because the required Coveo plugin cannot be installed in an Atlassian Cloud instance.

- 5.5 to 5.8.5

- Deprecated support versions: 2.5.3, 3.x, 4.x, 5.4

- Open the Confluence port

When the Coveo Master server and the Confluence server are separated by a firewall or another network infrastructure restricting the communication, the Confluence server port (default is 8090) must be opened to allow the Coveo connector to access the content.

## What's Next?

Enable the Confluence remote API needed by the Confluence Legacy connector (see the Atlassian document [Enabling the Remote API](#)).

# Installing the Coveo Plugin for Atlassian Confluence

The Coveo Legacy connector for Confluence comes with a Confluence plugin. The connector needs the plugin to index permissions associated with each Confluence item so that users only see Confluence content to which they have access in Coveo search results. It is therefore recommended to install the plugin for Confluence 3.5.x, 4.x, and 5.8.5 on-premises installations.

Without the plugin, you must set the permissions globally on the source (see [Configuring and Indexing an Atlassian Confluence Source With the Legacy Connector](#)), and all indexed Confluence content is searchable by anyone that has the permissions to view the source content.

## Notes:

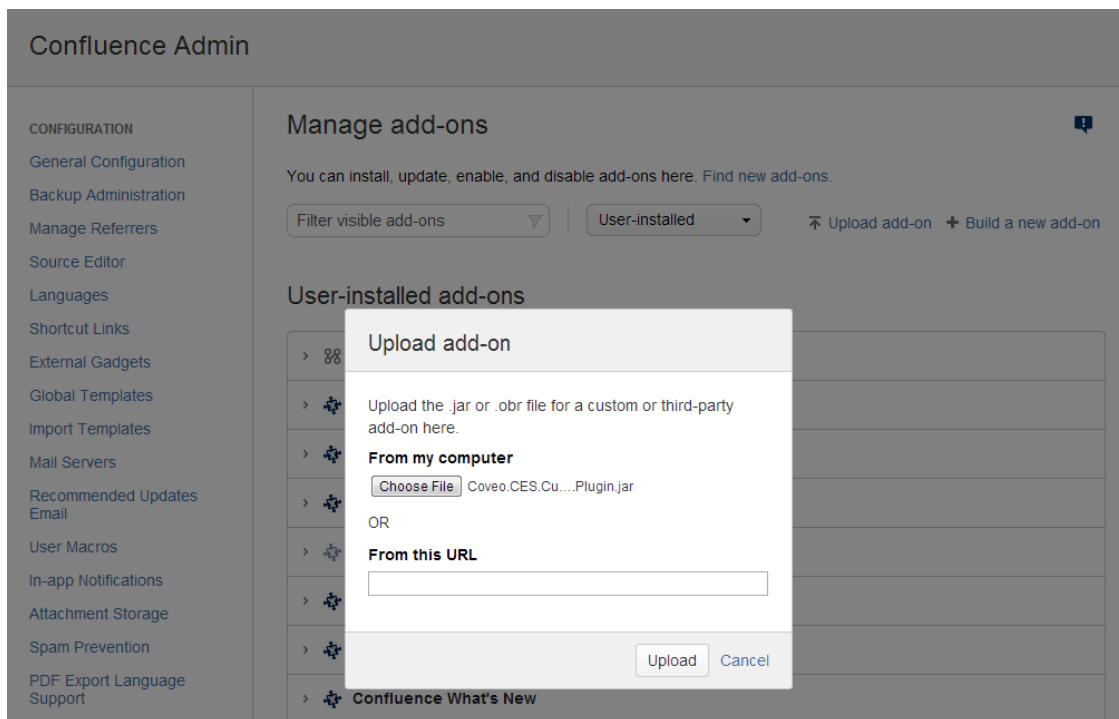
- The Coveo plugin cannot be installed in Confluence Cloud and consequently, permissions associated with each Confluence item cannot be indexed.
- The Coveo plugin is distributed with CES and is not available from the Atlassian Marketplace.
- **CES 7.0.7183+ (November 2014)** The Coveo Plugin for Atlassian Confluence is updated to version 1.01 to allow to specify an email security provider inside the Confluence security provider (see [Creating a Security Provider for the Atlassian Confluence Legacy Connector](#)).

## To install or update the Coveo Confluence Plugin

1. Log into your Confluence server using a Confluence administrator account.
2. On the menu, click **Browse > Confluence Admin**.
3. If the **Administrator Access** dialog box appears, enter your administrator

account credentials, and then click **Confirm**.

4. In the navigation panel on the left, under **Atlassian Marketplace**, click **Manage add-ons**.
5. In the **Manage add-ons** page, click the **Upload add-on** link.
6. In the **Upload add-on** dialog box:



- a. Click **Choose File**.
  - b. In the **Open** dialog box, select the [CES\_  
Path]\Bin\Coveo.CES.CustomCrawlers.Confluence.Plugin.jar file from your Coveo Master server, and then click **Open**.
  - c. Click **Upload**.
7. In the **Installed and ready to go!** dialog box, click **Close**.



**Note:** CES 7.0.8225– (March 2016) In the Confluence **Manage add-ons** page, the Coveo plugin reports being v. 1 even if it is actually version 1.0.1.

Installed and ready to go!



**Coveo Enhanced Soap API Plugin v. 1**

by Coveo

This add-on has been installed. If you need help getting started, click the link to the add-on documentation from the **Manage add-ons** screen.

Close

You can see the actual plugin version in the CES index logs by looking for the message in the form:

```
Confluence plugin version is: [pluginVersion]
```

8. In the **User-installed add-ons** list, validate that the **Coveo Enhanced Soap API Plugin** is listed.

**Note:** If you reinstall or upgrade the Coveo plugin on your Confluence instance, you must restart the Confluence service to overcome a known Confluence issue that causes Confluence to return an `IllegalArgumentException` when the Coveo plugin is used, preventing to index your Confluence source (see [Broken Webservice when redeploying RPC Plugin Module](#)).

When this issue occurs, you can get error messages similar to the followings depending on your CES version:

- **CES 7.0.8388+ (June 2016)** `CONFLUENCE_LEGACY_PLUGIN_UNABLE_TO_CONNECT`
- **CES 7.0.8225– (March 2016)**

```
An error occurred while initializing the Blade "[Confluence_Source_Name]" (ID #8): Unexpected exception in method 'InitBlade':
```

```
Coveo.CES.CustomCrawlers.Confluence.ConfluenceFatalException: Unable to connect to the Confluence database --->
Coveo.CES.CustomCrawlers.Confluence.ConfluenceFatalException:
Unable to connect to the Confluence database --->
```

```
Coveo.CES.CustomCrawlers.Confluence.ConfluenceFatalException: Unable to connect to the Coveo enhanced web service --->
```

```
Coveo.CES.CustomCrawlers.Confluence.ConfluenceIgnorableException: SoapException --->
```

```
System.Web.Services.Protocols.SoapException:
```

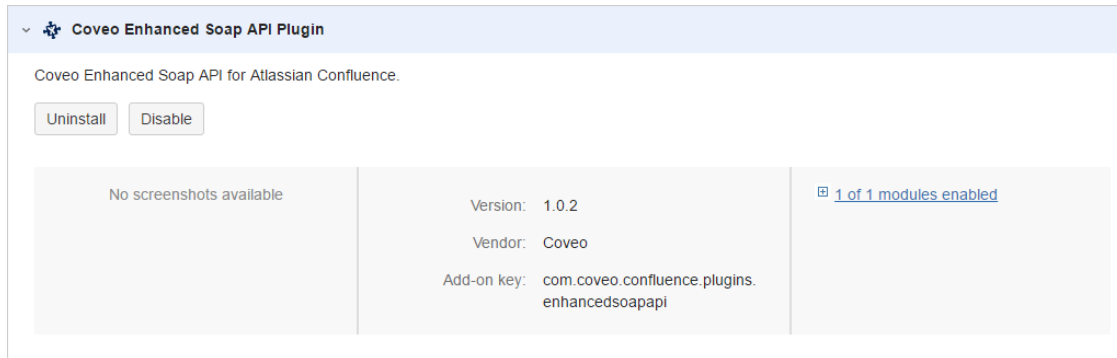
```
The AXIS engine could not find a target service to invoke!
targetService is coveo-enhanced-service
```

```
An error occurred while initializing the Blade "[Confluence_Source_Name]" (ID #6): Unexpected exception in method 'InitBlade':
```

```
Coveo.CES.CustomCrawlers.Confluence.ConfluenceFatalException: Unable to connect to the Confluence database --->
Coveo.CES.CustomCrawlers.Confluence.ConfluenceFatalException: Unable to connect to the Confluence database --->
Coveo.CES.CustomCrawlers.Confluence.ConfluenceFatalException: Unable to connect to the Coveo enhanced web service --->
Coveo.CES.CustomCrawlers.Confluence.ConfluenceIgnorableException: SoapException --->
System.Web.Services.Protocols.SoapException: Tried to invoke method public abstract java.lang.String com.coveo.confluence.plugins.enhancedsoapapi.EnhancedSoapAPI.getPluginVersion(java.lang.String) with arguments java.lang.String. The arguments do not match the signature.; nested exception is: java.lang.IllegalArgumentException: object is not an instance of declaring class
```

## To uninstall the Coveo Confluence plugin

1. Log into your Confluence server using a Confluence administrator account.
2. On the menu, click **Browse > Confluence Admin**.
3. If the **Administrator Access** dialog box appears, enter your administrator account credentials, and then click **Confirm**.
4. In the navigation panel on the left, under **Atlassian Marketplace**, click **Manage add-ons**.
5. In the **User-installed add-ons** list, locate and expand **Coveo Enhanced Soap API Plugin**.
6. In the **Coveo Enhanced Soap API Plugin** section, click **Uninstall**.



7. In the **Confirm** dialog box, click **Continue**.
8. Validate the **Coveo Enhanced Soap API Plugin** is no longer listed in the **User-installed add-ons** list.

# Adding a User Identity

A user identity is a set of credentials for a given repository or system that you enter once in CES and can then associate with one or more sources or security providers.

A user identity typically holds the credentials of an account that has read access to all the repository items that you want to index. It is a best practice to create an account to be used exclusively by the Coveo processes and for which the password does not change. If the password of this account changes in the repository, you must also change it in the CES user identity.

## To add a user identity

1. On the Coveo server, access the Administration Tool.
2. In the Administration Tool, select **Configuration > Security**.
3. In the navigation panel on the left, click **User Identities**.
4. In the **User Identities** page, click **Add**.
5. In the **Modify User Identity** page:

The screenshot displays the 'MODIFY USER IDENTITY' configuration interface. The top navigation bar includes 'Status', 'Index', 'Content', 'Reports', 'Logs', 'Configuration', and 'Support'. Below this, a secondary navigation bar lists various configuration categories: 'Security', 'Schedules', 'Connectors', 'Converters', 'Document Types', 'Languages', 'Fields', 'Field Aliases', 'XML', 'SharePoint', 'License', 'Alerts', 'Pre-loading', and 'Advanced'. The 'Security' category is active, and the left-hand navigation panel shows 'User Identities' selected. The main content area is titled 'MODIFY USER IDENTITY' and includes a sub-header 'Defines the parameters of this user identity.' and a 'Help' button. The configuration fields are as follows:

- Roles:** A list on the left containing 'Impersonators', 'Security Providers', 'User Identities' (highlighted), and 'Super User Access'.
- Breadcrumb:** 'Security - User...' with a back arrow.
- Name:** A text input field.
- User:** A text input field.
- Password:** A text input field.
- Option:** A section containing a checked checkbox for 'Support basic authentication'.
- Used By:** A text input field.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

- a. In the **Name** box, enter a name of your choice to describe the account that you selected or created in the repository to allow CES to access the repository.

**Note:** This name appears only in the Coveo Administration Tool, in the **Authentication** or **User Identity** drop-down lists, when you respectively define a source or a security provider.

- b. In the **User** box, enter the username for the account that you selected or created to crawl the repository content that you want to index.
- c. In the **Password** box, enter the password for the account.
- d. In the **Options** section, the **Support basic authentication** check box is deprecated and not applicable for most types of repositories. You should select it only when you need to allow CES to send the username and password as unencrypted text.
- e. Click **Save**.

**Important:** When you use Firefox to access the Administration Tool and it proposes to remember the password for the user identity that you just created, select to never remember the password for this site to prevent issues with automatic filling of username and password fields within the Coveo Administration Tool.

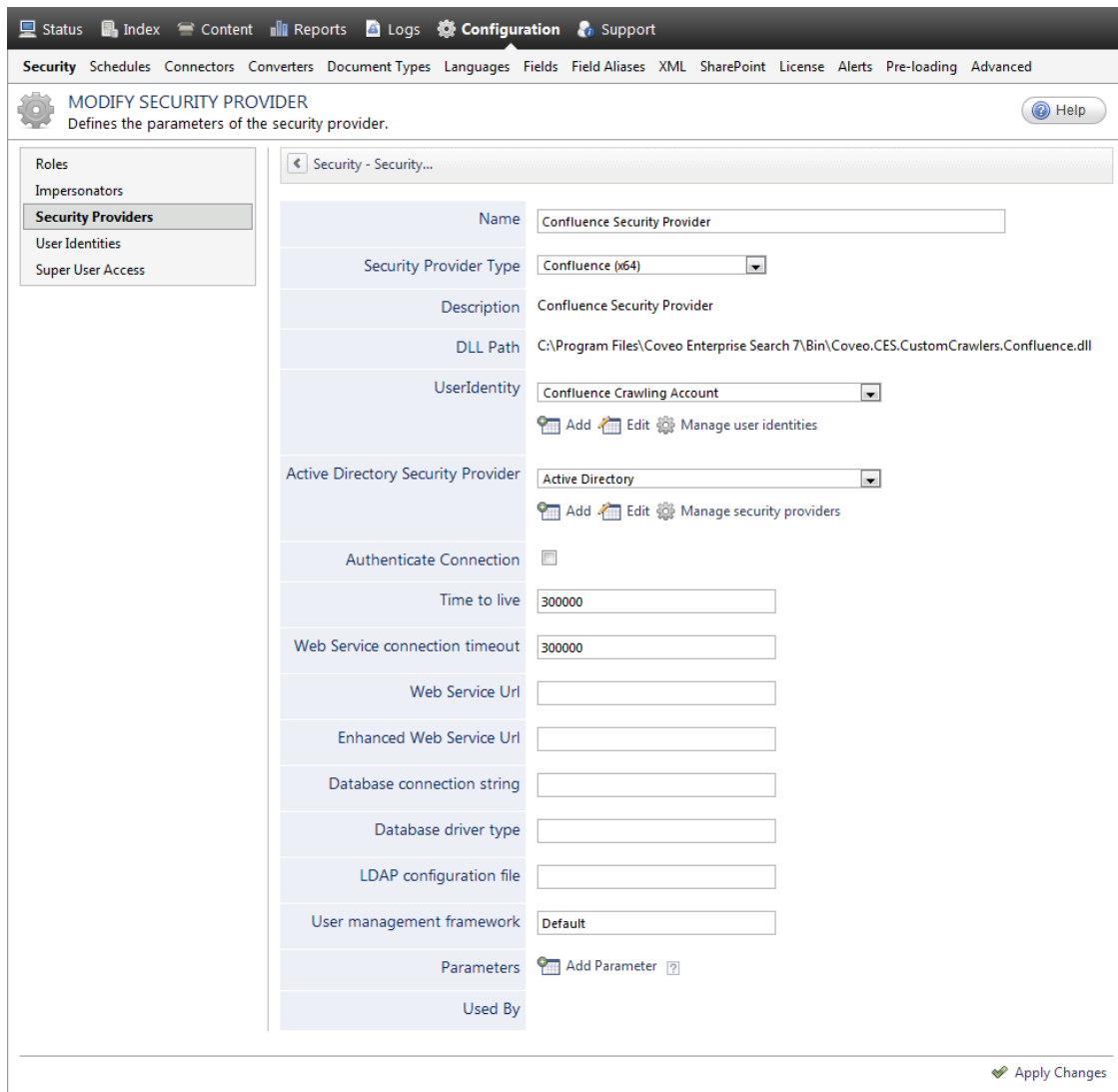
# Creating a Security Provider for the Atlassian Confluence Legacy Connector

For an on-premises Confluence, when you choose to index document permissions associated with Confluence items, the Coveo connector needs a security provider. When document permissions are indexed, in Coveo search results, a user searching for Confluence content only sees the content to which he has access in Confluence.

**Note:** You can get familiar with how Coveo components deal with permissions on documents both at indexing and query time.

## To configure a Confluence security provider

1. On the Coveo server, access the Administration Tool.
2. Select **Configuration > Security**.
3. In the navigation panel on the left, click **Security Providers**.
4. In the **Security Providers** page, click **Add** to create a new security provider.
5. In the **Modify Security Provider** page:



a. Configure the following required parameters:

**Name**

Choose a significant name to identify the security provider.

**Example:** Confluence Security Provider



## Security Provider Type

Select **Confluence (x64)**.

## User Identity

Select the Confluence user identity that you created previously (see [Adding a User Identity](#)).

## Security Provider

Select **Active Directory** or a custom Active Directory security provider that you created for a specific domain to allow this Confluence security provider to map Confluence permissions to AD users.

**CES 7.0.7183+ (November 2014)** You can select an email security provider to allow this Confluence security provider to map Confluence permissions to emails. This is useful when your users are authenticated in the search interface with the same email address specified for their Confluence user, thus allowing them to also see secured documents to which they have read permissions.

**Note:** Connecting to an email security provider requires the plugin version 1.0.1+ (see [Installing the Coveo Plugin for Atlassian Confluence](#)).

## Web Service URL

The address of the Confluence server. This should be the same address as the one that you will specify when you configure the source for the connector (see [Configuring and Indexing an Atlassian Confluence Source With the Legacy Connector](#)). Enter the URL in the following format:

```
http://[ConfluenceServer]:[port]
```

**Example:** `http://MyConfluenceServer:8090`

### Enhanced Web Service URL

For Confluence version 3.5.0 to 5.8.5 installations, you must enter the URL pointing to the Coveo web service provided by the Coveo plugin on the Confluence server in the following format:

```
http://[ConfluenceServer]:[port]/rpc/soap-axis/coveo-enhanced-service
```

**Example:** `http://MyConfluenceServer:8090/rpc/soap-axis/coveo-enhanced-service`

### Authenticate Connection

Select this check box when you selected your Confluence user identity in **User Identity** to use it to authenticate the connection when connecting to the Confluence web services. The check box is cleared by default.

- b. For a Confluence 2.5.3 to 3.4.x installation, include the following required parameters:

### DB Connection String

A valid database connection string to allow the connector to retrieve the security information from the Confluence database.

**Example:** `server=MyServer;database=MyDatabase;User=MyUser;Password=MyPassword`

### Database Driver Type

Driver type to use to connect to the Confluence database. Possible values are: `SqlClient`, `OleDb`, or `Odbc`.

## LDAP Configuration File

For LDAP integrations only, path of the Confluence LDAP configuration file (`atlassian-user.xml`) from which the connector automatically extracts the LDAP connection settings.

**Example:** `\\server\c$\confluence\WEB-INF\classes\atlassian-user.xml`

**Note:** When your Confluence server has an LDAP integration, the Confluence connector must also connect to the LDAP servers to extract the information of the LDAP members and to retrieve the members of LDAP groups (see the Atlassian document [Connecting to an LDAP Directory](#)).

## User Management Framework

Default Confluence user management framework to use (see the Atlassian document [Understanding User Management in Confluence](#)). Possible values are: `Default`, `AtlassianUser`, or `OSUser`. This parameter is optional.

- c. Consider revising the default value of the following parameters:

### Time to Live

Number of milliseconds before refreshing the cache of members. The default value is `300000` ms (5 minutes).

### Web Service Connection Timeout

Maximum number of milliseconds a Web service call should wait. The default value is `300000` ms (5 minutes).

### Allow Complex Identities

Leave this option cleared as it does not apply to this type of security

provider.

- d. Click **Apply Changes**.

## What's Next?

Configure and index a Confluence source (see [Configuring and Indexing an Atlassian Confluence Source With the Legacy Connector](#)).

# Configuring and Indexing an Atlassian Confluence Source With the Legacy Connector

A source defines a set of configuration parameters for a specific Confluence site.

To configure and index a Confluence source

1. On the Coveo server, access the Administration Tool.
2. Select **Index > Sources and Collections**.
3. In the **Collections** section:
  - a. Select an existing collection in which you want to add the new source.

OR

  - b. Click **Add** to create a new collection.
4. In the **Sources** section, click **Add**.

The **Add Source** page that appears is organized in three sections.
5. In the **General Settings** section of the **Add Source** page:

The screenshot shows the 'COLLECTION: CMS - ADD SOURCE' configuration page. The 'General Settings' section includes the following fields:

- Name:** Corporate Confluence Wiki
- Source Type:** Confluence
- Addresses:** http://MyConfluenceWiki:8090/
- Rating:** Normal
- Document Types:** Default
- Active Languages:** Default
- Fields:** Default Scheme
- Refresh Schedule:** Every day

a. Enter the appropriate value for the following required parameters:

### Name

A descriptive name of your choice for the connector source.

**Example:** Corporate Confluence Wiki

### Source Type

The connector used by this source. In this case, select **Confluence**.

**Note:** If you do not see **Confluence** in the **Source Type** list, ensure that your environment meets the requirements (see [Atlassian Confluence Legacy Connector Requirements](#)).

### Addresses

List of starting points for the connector, one address per line.

**Examples:** Use the Confluence server root URL as the starting address to index a complete Confluence site:

```
http://MyConfluenceServer:8090/
```

To index specific spaces, add their URL as starting addresses:

```
http://MyConfluenceServer:8090/display/space1
```

```
http://MyConfluenceServer:8090/display/space2
```

where `space1` and `space2` the Confluence `spacekey` for the desired space.

To index Confluence Cloud content:

```
https://MyCompany.atlassian.net/wiki/
```

#### Notes:

- To be able to index document permissions, all your starting points must be located on a single Confluence site. Create separate sources for separate sites.
- **CES 7.0.6830+ (July 2014)** You can enter specific space addresses for deployments where Confluence is not installed at the server root such as: `http://server/MyConfluence/display/spacename`.

b. The following parameters often do not need to be changed:

#### Rating

Change this value only when you want to globally change the rating associated with all items in this source relative to the rating of other sources.

**Example:** When the source indexes a legacy repository, you may want to set this parameter to **Low**, so that in the search interface, results from this source appear lower in the list compared to those from active repository sources.

## Document Types

If you defined a custom document type set for this source, select it.

## Active Languages

If you defined custom active language sets, ensure to select the most appropriate for this source.

## Fields

If you defined custom field sets, ensure to select the most appropriate for this source.

## Refresh Schedule

Time interval at which the index is automatically refreshed to keep the index content up-to-date. By default, the **Every day** option instructs CES to refresh the source everyday at 12 AM.

6. In the **Specific Connector Parameters & Options** section of the **Add Source** page:





- a. Next to **Parameters**, for Confluence version 2.x to 3.4.x installations, when you chose to index permissions, click **Add Parameter** to add the `DBConnectionString`, `DBDriverType`, and `LDAPConfigFilePath` mandatory source parameters with the same value entered for the security provider (see [Creating a Security Provider for the Atlassian Confluence Legacy Connector](#)).

Parameters	
Name	Value
<input type="text" value="DBConnectionString"/>	<input type="text" value="server=MyServer;database=MyData"/> Delete
<input type="text" value="DBDriverType"/>	<input type="text" value="sqlclient"/> Delete
<input type="text" value="LDAPConfigFilePath"/>	<input type="text" value="\\server\c\$\confluence\WEB-"/> Delete
Add Parameter	

**Note:** Other advanced parameters are also available (see [Modifying Hidden Atlassian Confluence Source Parameters for the Legacy Connector](#)).

- b. The **Option** check boxes generally do not need to be changed:

### Index Subfolders

Keep this check box selected (recommended). By doing so, all subfolders from the specified server address are indexed.

### Index the document's metadata

When selected, CES indexes all the document metadata, even metadata that are not associated with a field. The orphan metadata are added to the body of the document so that they can be searched using free text queries.

When cleared (default), only the values of system and custom fields that have the **Free Text Queries** attribute selected will be searchable without using a field query.

**Example:** A document has two metadata:

- `LastEditedBy` containing the value `Hector Smith`
- `Department` containing the value `RH`

In CES, the custom field `CorpDepartment` is bound to the metadata `Department` and its **Free Text Queries** attribute is selected.

When the **Index the document's metadata** option is cleared, searching for `RH` returns the document because a field is indexing this value. Searching for `hector` does not return the document because no field is indexing this value.

When the **Index the document's metadata** option is selected, searching for `hector` also returns the document because CES indexed orphan metadata.

### Document's addresses are case-sensitive

Leave the check box cleared. This parameter needs to be checked only in rare cases for systems in which distinct documents may have the same name but different casing.

### Generate a cached HTML version of indexed documents

When you select this check box (recommended), at indexing time, CES creates HTML versions of indexed documents. In the search interfaces, users can then more rapidly review the content by clicking the **Quick View** link rather than opening the original document with the original application. Consider clearing this check box only when you do not want

to use **Quick View** links or to save resources when building the source.

### Open results with cached version

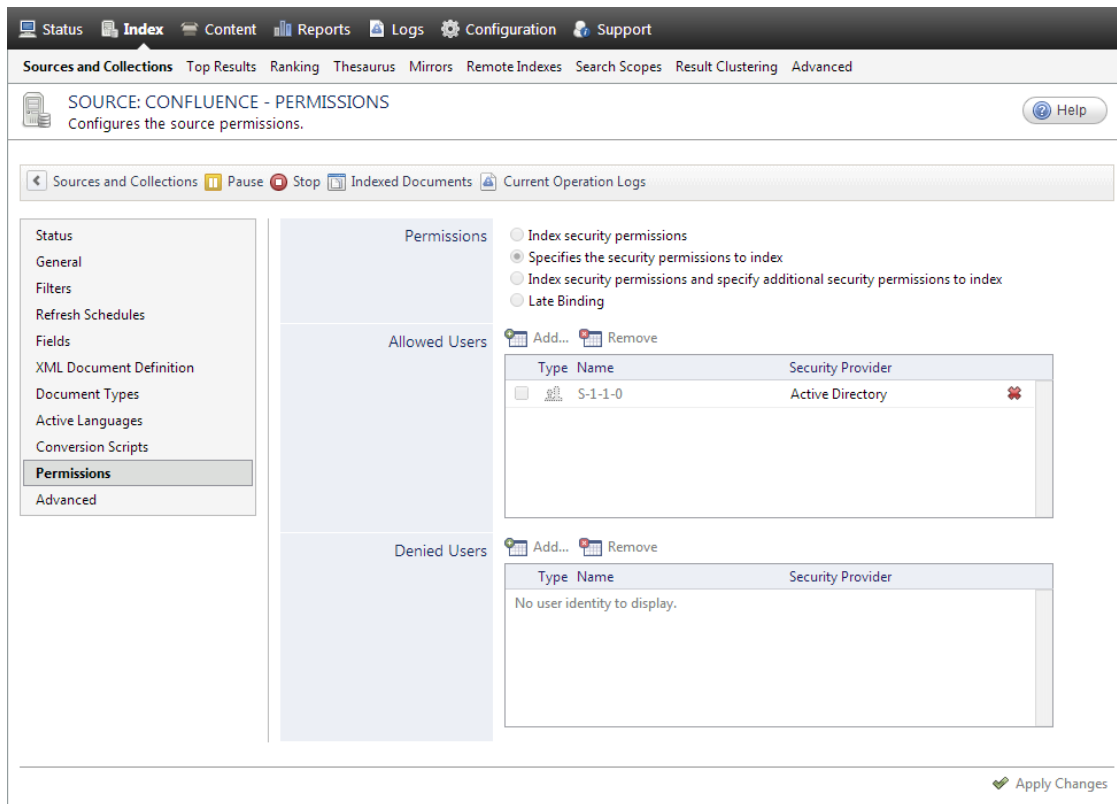
Leave this check box cleared (recommended) so that in the search interfaces, the main search result link opens the original document with the original application. Consider selecting this check box only when you do not want users to be able to open the original document but only see the HTML version of the document as a Quick View. In this case, you must also select **Generate a cached HTML version of indexed documents**.

7. In the **Security** section of the **Add Source** page:



The screenshot shows the 'Security' section of the 'Add Source' page. It features two main sections: 'Security Provider' and 'Authentication'. The 'Security Provider' section has a dropdown menu currently set to 'Confluence Security Provider', with a question mark icon to its right. Below this dropdown are three icons: a plus sign for 'Add', a pencil for 'Edit', and a gear for 'Manage security providers'. The 'Authentication' section has a dropdown menu currently set to 'Confluence Crawling Account', also with a question mark icon to its right. Below this dropdown are three icons: a plus sign for 'Add', a pencil for 'Edit', and a gear for 'Manage user identities'. At the bottom right of the form, there are three buttons: a green checkmark for 'Save', a green play button for 'Save and Start', and a red X for 'Cancel'.

- a. In the **Security Provider** drop-down list, if you chose to index permissions, select the Confluence security provider that you created for this source (see [Creating a Security Provider for the Atlassian Confluence Legacy Connector](#)), otherwise, select **None**.
  - b. In the **Authentication** drop-down list, if you chose to index permissions, select the Confluence crawling user identity that you created for this source. Otherwise, select **None**.
  - c. Click **Save** to save the source configuration.
8. When you chose to NOT index permissions, you must set the permissions globally for the source:



- In the navigation menu on the left, select **Permissions**.
- Next to **Permissions**, select the **Specifies the security permissions to index** option.
- Next to **Allowed Users**, ensure that a well-known everyone group such as the Active Directory `S-1-1-0` is added.
- Click **Apply Changes**.

**Note:** You may need to enable the anonymous access to the remote API for your Confluence site (see [Anonymous Access to Remote API](#)) to prevent getting an error message similar to the following one in the CES Console or logs:

```
Cannot load the provided starting address:  
http://ConfluenceServer:8090/ -> Unable to connect to this  
address: 'http://ConfluenceServer:8090/' -> SoapException ->  
com.atlassian.confluence.rpc.NotPermittedException:  
Anonymous RPC access is disabled on this server
```

9. Validate that the source building process is executed without errors:

- In the navigation panel on the left, click **Status**, and then validate that the indexing proceeds without errors.

OR

- Open the CES Console to monitor the source building activities.

## What's Next?

Add the built-in the Confluence facet to your search interface (see [Managing Built-in Facets and Related Results Appearing in a .NET Search Interface](#)).

## Modifying Hidden Atlassian Confluence Source Parameters for the Legacy Connector

The **Add Source** and **Source: ... General** pages of the Administration Tool present the parameters with which you can configure the connector for most Confluence setups. More advanced and more rarely used parameters are hidden. You can choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value. Consider changing values of hidden parameters when you encounter issues.

The following list describes the advanced hidden parameters available with Confluence sources. The parameter type (integer, string,...) appears between parentheses following the parameter name.

**WebServiceConnectionRetryCount (Integer)**

Maximum number of retries to perform when a Web service call fails. The default value is 3.

**WebServiceConnectionRetryDelay (Integer)**

Number of milliseconds to wait before retrying when a Web service call fails. The default value is 30000 ms (30 seconds).

**WebServiceConnectionTimeout (Integer)**

Maximum number of milliseconds a Web service call should wait. The default value is 30000 ms (30 seconds).

**EnhancedWebServiceUrl (String)**

For Confluence version 3.5.0, 4.x, and 5.8.5 the enhanced web service URL pointing to the Coveo web service provided by the Coveo plugin installed on the Confluence server.

**Example:** `http://MyConfluenceServer:8090/rpc/soap-axis/coveo-enhanced-service`

**For Confluence version 2.5.3 to 3.4.x installations only****DBConnectionString (String)**

Required parameter describing the string used by the source to connect to the Confluence database.

### DBDriverType (String)

Required parameter specifying the driver type to use to connect to the Confluence database. Possible values are: `SqlClient`, `OleDb`, or `Odbc`.

### LDAPConfigFilePath (String)

When your Confluence site uses LDAP integration, required parameter specifying the path of the Confluence LDAP configuration file (`atlassian-user.xml`).

```
Example: \\server\c$\confluence\WEB-INF\classes\atlassian-user.xml
```

### UserManagementFramework

Optional parameter specifying the default Confluence user management framework to use (see the Atlassian document [Understanding User Management in Confluence](#)). Possible values are: `Default`, `AtlassianUser`, or `OSUser`.

Use the following procedure only when you want to modify one or more of the above hidden source parameters.

### To modify hidden Confluence source parameters

1. Refer to [Adding an Explicit Connector Parameter](#) to add one or more Confluence hidden source parameters.
2. For a new Confluence source, access the **Add Source** page of the Administration Tool to modify the value of the newly added advanced parameter:
  - a. Select **Index > Sources and Collections**.
  - b. Under **Collections**, select the collection in which you want to add the

source.

- c. Under **Sources**, click **Add**.
  - d. In the **Add Source** page, edit the newly added advanced parameter value.
3. For an existing Confluence source, access the **Source: ... General** page of the Administration Tool to modify the value of the newly added advanced parameter:
- a. Select **Index > Sources and Collections**.
  - b. Under **Collections**, select the collection containing the source you want to modify.
  - c. Under **Sources**, click the existing Confluence source in which you want to modify the newly added advanced parameter.
  - d. In the **Source: ... General** page, edit the newly added advanced parameter value.
4. Rebuild your Confluence source to apply the changes to the parameters.

## Adding an Explicit Connector Parameter

Connector parameters applying to all sources indexed using this connector are called explicit parameters.

When you create or configure a source, the Coveo Enterprise Search (CES) 7.0 Administration Tool presents parameters with which you can configure the connector for most setups. For many connectors, more advanced and more rarely used parameters also exist but are hidden by default. CES then uses the default value associated with each of these hidden parameters.

You can however choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value.



## To add an explicit connector parameter

1. On the Coveo server, access the Administration Tool.
2. Select **Configuration > Connectors**.
3. In the list on the **Connectors** page, select the connector for which you want to show advanced hidden parameters.
4. In the **Parameters** section of the selected connector page, click **Add Parameter** for each hidden parameter that you want to modify.

**Note:** The **Add Parameter** button is present only when hidden parameters are available for the selected connector.

5. In the **Modify the parameters of the connector** page:

The screenshot displays the 'MODIFY THE PARAMETERS OF THE CONNECTOR' page. The breadcrumb trail is 'Connectors - Active...'. The page title is 'MODIFY THE PARAMETERS OF THE CONNECTOR. Defines the parameters of this connector.' with a 'Help' button. The form fields are:

- Type: String (dropdown menu)
- Name: [Text input] ?
- Default Value: [Text input] ?
- Label: [Text input] ?
- Quick Help: [Text input] ?
- Option:
  - Optional parameter
  - Sensitive information ?
  - Validate as an email address
- Maximum length: [Text input] ?

At the bottom right, there are 'Save' and 'Cancel' buttons.

- a. In the **Type** list, select the parameter type as specified in the parameter description.
- b. In the **Name** box, type the parameter name exactly as it appears in the parameter description. Parameter names are case sensitive.
- c. In the **Default Value** box, enter the default value specified in the parameter description.

**Important:** Do not set the value that you want to use for a specific source. The value that you enter here will be used for all sources defined using this connector so it must be set to the recommended default value. You will be able to change the value for each source later, in the **Add Source** and **Source: ... General** pages of the Administration Tool.


- d. In the **Label** box, enter the label that you want to see for this parameter.

**Example:** To easily link the label to the hidden parameter, you can simply use the parameter name, and if applicable, insert spaces between concatenated words. For the **BatchSize** hidden parameter, enter `Batch Size` for the label.

**Note:** To create multilingual labels and quick help messages, use the following syntax: `<@ln>text</@>`, where *ln* is replaced by the language initials—the languages of the Administration Tool are English (en) and French (fr).

**Example:** `<@fr>Chemin d'accès du fichier de configuration</@><@en>Configuration File Path</@>` is a label which is displayed differently in the French and English versions of the Administration Tool.

**Tip:** The language of the Administration Tool can be modified by pressing the following key combination: `Ctrl+Alt+Page Up`.

- e. Optionally, in **Quick Help**, enter the help text that you want to see for this parameter when clicking the question mark button  that will appear beside the parameter value.

**Tip:** Copy and paste key elements of the parameter description.

- f. When **Predefined values** is selected in the **Type** parameter, in the **Value** box that appears, enter the parameter values that you want to see available in the drop-down parameter that will appear in the Administration Tool interface. Enter one value per line. The entered values must exactly match the values listed in the hidden parameter description.
- g. Select the **Optional parameter** check box when you want to identify this parameter as an optional parameter. When cleared, CES does not allow you to save changes when the parameter is empty. This parameter does not appear for **Boolean** and **Predefined values** parameter types.
- h. Select the **Sensitive information** check box for password or other sensitive parameter so that, in the Administration Tool pages where the parameter appears, the typed characters appear as dots to mask them. This parameter appears only for the **String** type.

**Example:** When you select the **Sensitive information** check box for a parameter, the characters typed appear as follows in the text box:



- i. Select the **Validate as an email address** check box when you want CES to validate that the text string that a user enters in this parameter respects the format of a valid email address. This parameter appears only for the **String** type.
- j. In the **Maximum length** box, enter the maximum number of characters for the string. This parameter appears only for the **String** type. When you enter 0, the length of the string is not limited.
- k. Click **Save**.

6. Back in the **Connector** page, click **Apply Changes**.

The hidden parameter now appears in the **Add Source** and **Source: ... General** pages of the Administration Tool for the selected source. You can change the parameter value from these pages. Refer to the documentation for each connector for details.

**Note:** When you want to modify a hidden source parameter, you must first delete it, and then redefine it with the modified values.

# Managing Built-in Facets and Related Results Appearing in a .NET Search Interface

The Coveo .NET Front-End comes with a number of built-in facets and Related Results defined for various .NET search interfaces. You can modify which built-in facets and Related Results appear in each .NET search interface.

**Important:** The Related Results information is passed through the .NET search interface URL. When you add a few Related Results panels to a .NET search interface, the search interface URL can easily exceed the Internet Explorer URL length limit. Use the URL shortener feature to eliminate this issue.

## To manage the built-in facets and Related Results appearing in a .NET search interface

1. Access the Coveo .NET Front-End Interface Editor.
2. Select the **Search Interfaces** tab.
3. On the menu bar:
  - a. In the **Current Interface** drop-down list, select the search interface that you want to modify.
  - b. Click the **Features** menu.
4. In the navigation panel on the left, click **Facets and Related Results**.

In the panel on the right:

- The facets and Related Results panels currently appearing in the selected search interface are listed under **Facets and Related Results** in the order

that they appear in each of the facet and Related Results zones (**Hub default position, Right, Top or Left**).

- The available built-in facets are listed under **Built-in Facets**. Several built-in facets based on system fields are applicable to content from any repository. Other facets are exclusive to the content of a specific type of repository.

**Examples:** The **Author** facet is applicable to the content of any repository for which the `sysauthor` system field was populated. The **Liferay Type** facet is only applicable to Liferay content.

- The available built-in Related Results are listed under **Built-in Related Results**.

[Search Hubs](#) | [Search Interfaces](#) | [Audiences](#) | [Miscellaneous](#) | [Deployment](#)

[Features](#) | Styles | Fields | Preference Defaults | Advanced | Current Interface: Email

General

Options

**Facets and Related Results**

Culture

Scope

RSS Feeds

OpenSearch Provider

Ranking

### Basic Configuration

Default Facet Position: Hub default facet position

Default Related Results Position: Hub default related results position

### Facets and Related Results

[Add New Facet](#) | [Add New Related Results](#) | [Delete](#)

<input type="checkbox"/>	Mailbox (@sysmailbox)	Default	Up   Down
<input type="checkbox"/>	From (@sysdisplayfrom)	Default	Up   Down
<input type="checkbox"/>	To (@sysdisplayrecipients)	Default	Up   Down
<input type="checkbox"/>	Type (@sysfiletype)	Default	Up   Down
<input type="checkbox"/>	Exchange Type (@sysfiletype)	Default	Up   Down
<input type="checkbox"/>	Notes Type (@sysfiletype)	Default	Up   Down
<input type="checkbox"/>	Exchange Folder (@sysemailfolders)	Default	Up   Down
<input type="checkbox"/>	Year (@sysyear)	Default	Up   Down
<input type="checkbox"/>	Month (@sysmonth)	Default	Up   Down
<input type="checkbox"/>	Related People (People)	Default	Up   Down

**Built-in Facets:**

- Add "Type"
- Add "Author"
- Add "Collection"
- Add "Language"
- Add "Year"
- Add "Month"
- Add "Exchange Type"
- Add "Notes Type"
- Add "From"
- Add "To"
- Add "Exchange Folder"
- Add "Mailbox"
- Add "Company"
- Add "Work Title"
- Add "Manager"
- Add "Salesforce Type"
- Add "Salesforce Owner"
- Add "Salesforce Account"
- Add "Country"
- Add "Industry"
- Add "Opportunity Stage"
- Add "Close Quarter"
- Add "Product"
- Add "SharePoint Type"
- Add "SharePoint Content Type"
- Add "SharePoint Parent"
- Add "SharePoint Site"
- Add "SharePoint Document Set"
- Add "Confluence Space"
- Add "Confluence Type"
- Add "Confluence Label"
- Add "Jive Item Type"
- Add "Jive Place"
- Add "Jive Place Type"
- Add "Jive Tag"
- Add "Jive Category"
- Add "Task Assigned To"
- Add "Dynamics Type"
- Add "Dynamics Account"
- Add "Dynamics Owner"
- Add "Dynamics Product"
- Add "Liferay Type"

**Built-in Related Results:**

- Add "Account Console"
- Add "API Reference"
- Add "Case Console"
- Add "Clearspace"
- Add "Default"
- Add "File Shares"
- Add "File Shares"
- Add "Images"
- Add "Intranet"
- Add "People"
- Add "Personal Files"
- Add "Salesforce"
- Add "Shared Emails"
- Add "SharePoint 2007"
- Add "SharePoint 2010"
- Add "SharePoint 2013"
- Add "SharePoint Sites and Lists"

5. You can perform one the following operations:

- Add a built-in facet to the search interface:

In the **Built-in Facets** list, click the **Add "[FacetName]"** link corresponding to the facet that you want to add.

**Note:** For the **Type** facet, the default list of **Allowed Values** (facet items) is the following:

```
audio, doc, html, image, mapimail, mime, mpp, msg, one, pdf, ppt, rtf, txt, video, wp, xls, zip.
```

If you want the **Type** facet to show other file types as facet items, simply add the needed file types to the default list in the **Allowed Values** parameter box.

**Example:**

```
audio, doc, html, image, mapimail, mime, mpp, msg, one, pdf, ppt, rtf, txt, video, wp, xls, zip, vsd
```

The corresponding facet appears at the end of the **Facets and Related Results** list.

- Add a built-in Related Results panel to the search interface:

In the **Built-in Related Results** list, click the **Add "[RelatedResultsName]"** link corresponding to the Related Results panel that you want to add.

The corresponding Related Results appears at the end of the **Facets and Related Results** list.

- Remove a facet or Related Results from the search interface:
  - In the **Facets and Related Results** list, select the check box of one or more facets or Related Results that you want to remove.



- Click **Delete** (above the **Built-in Facets** list).
- Click **Yes** when prompted to confirm the delete operation.
- Change the order in which facets and Related Results appear in the search interface:

In the **Custom Facets** list:

- a. On the line corresponding to the facet or Related Results that you want to reorder, click **Up** or **Down** as many times as needed to relocate the facet or Related Results in relation with the others in the same zone.
- b. Repeat for each facet or Related Results that you want to reorder.

**Note:** When the position of a facet or a Related Results panel is **Default**, the position is inherited from the search interface or search hub default position.

6. Access and refresh the search interface, and then validate that the built-in facet and Related Results changes are as desired.

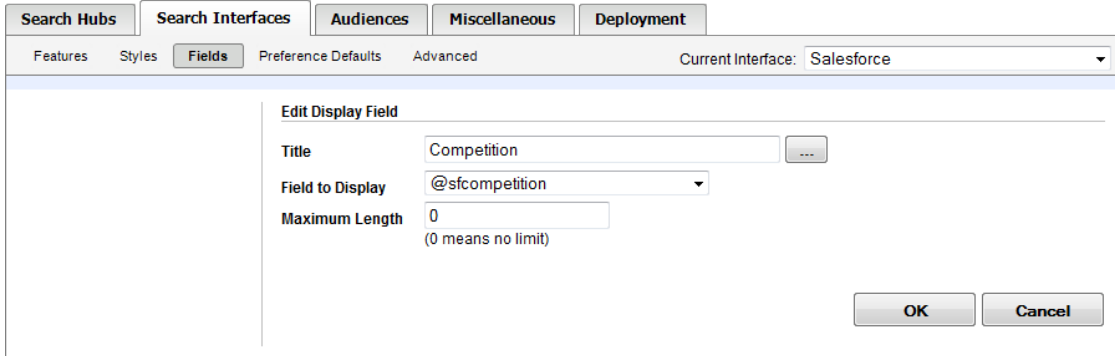
# Adding Display Fields to Search Results With the .NET Interface Editor


In a Coveo .NET Front-End search interface, display fields provide additional information concerning each search result (see [What Are Display Fields?](#)). By default, all system fields and new custom fields that you create are set as display fields in the index so they are available from the .NET Interface Editor to be included as Display Fields in the search results of a given .NET search interface. Display fields also appear in the **Index Browser** which is useful for troubleshooting purposes.

**Note:** Fields are available as Display Fields in the .NET Interface Editor only when they are set as display fields in the index.

## To add a display field to search results with the .NET Interface Editor

1. Access the Coveo .NET Front-End Interface Editor.
2. Select the **Search Interfaces** tab.
3. In the **Current Interface** drop-down list, select the interface for which you want to add a display field.
4. Select the **Fields** menu.
5. In the navigation panel on the left, select **Display Fields**.
6. Next to **Additional Fields to Display with Results**, click **Add New**.
7. Under **Edit Display Field**:



- a. In the **Title** box:
    - i. Enter an English label to identify the field.  
This label appears in the search results.
    - ii. Click the  button next to the box to open a dialog box where you can enter the label translated for the other supported languages.
  - b. In the **Field to Display** drop-down list, select the field that you want to add as a display field.
  - c. In the **Maximum Length** box, enter the maximum number of characters to display.
  - d. Click **OK**.
8. Under **Additional Fields to Display with Results** you can:
- Modify the display order of the fields by clicking the **Up** and **Down** links.
  - Remove display fields by selecting them and clicking **Delete**.

## What Are Display Fields?

The label and the value of a display field can appear in the search results of an out-of-the-box .NET search interface. As a Coveo administrator, using the .NET Interface Editor you can quickly add display fields to search results to provide additional information and help users identify documents that they are looking for (see [Adding Display Fields to Search Results With the .NET Interface Editor](#)).

By default, in the out-of-the-box .NET search interfaces, display fields appear in a smaller font at the end of the search result but before the link elements.

**Example:** In a search interface for a CRM system like Salesforce, you can set the `sfcompetition` field as a display field to include the competitive information in the search result. A user can see the competitors identified for a sales opportunity without having to open the search result.



1

**United Oil & Gas Corp. [United Oil Installations]** 2008-Q4

**Owner:** Liz Smith  
**Account:** United Oil & Gas Corp.  
**Type/Stage:** Existing Customer - Upgrade / Closed Won  
**Amount:** 235,000  
**Lead Source:** External Referral  
**Last Modified:** 2/11/2009 (Liz Smith)  
**Competition:** Sandoil Inc.; Gas Corp Inc.  
Opportunities ▼ | Opened 8 times, September 11

1 The `sfcompetition` display field with the **Competition** label lists the identified competitors for this opportunity