

Exercise 1 - How to set up Xporter and print your first document

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Introduction

This is the first exercise of the Basic Level. The main goal is to give you an idea of the tasks that must be performed in order to print your first document.

Immediately after installing the Xporter app and taking care of the [license details](#), when you refresh the Apps page of the Jira Administration, the Xporter for Jira administration section will be displayed on the left sidebar.



The Xporter for Jira administration section allows you to manage the Global Settings, Templates, Permissions, File Servers and the Vendor License.

Navigate to **Global Settings**, and you'll see its 4 major sections: *Output Options*, *Bulk Export Options*, *Global Permissions* and *Jira Service Desk*.

Output Options

Here, you can select the available formats of the Xporter-generated document, as well as the Default format.


Output Options


- Output formats
- ☒ DOCX (Word)
 - ☐ ODT (Openoffice)
 - ☒ PDF
 - ☐ PNG
 - ☐ RTF
 - ☐ SVG
 - ☒ XLSX (Excel)

Default format

This is the default export format that is selected when a issue is viewed on a bulk export is performed.

Unselect all the options and click **Save**. You will get an *Error!* message informing you that *It is required to have at least one Output Format enabled*. Select only the **XLSX (Excel)**, **DOCX (Word)** and **PDF** on the *Output formats*, as well as **PDF** on the *Default format* and click **Save** again. This time, a *Success!* message will be displayed informing you that the *Global Settings successfully saved*.

 Even with all the *Output formats* selected, the format of your generated document is limited by the extension of the Template you're using.
For more information, please check the Outputs Matrix on our documentation [here](#).

 When the set *Default format* isn't compatible with the template you've selected to export, only the compatible options you've selected on the *Output format* will be available. If you did not select a compatible format, you won't be able to generate a document

Bulk Export Options

Here, you can select the default *Break Pages* option, and set the *Maximum number of issues* allowed to export at one time as well as the *Maximum number of simultaneous requests* of Xporter processes that can be run.

Bulk Export Options

Break Pages

This option controls if and when page breaks are made while exporting multiple issues.


Maximum number of issues

This option controls how many issues is a user allowed to export at one time, using a multiple issues export.

Maximum number of simultaneous requests

This option controls how many xporter processes can be run simultaneously.

Whatever the *Break Pages* option you select here, you'll always have the opportunity to change it whenever you try to bulk export. For now, select **Issues** and click **Save**.

 While **Never** makes all the issues content to be displayed in a continuous text on the generated file, all the other options make use of Page Breaks to split the issue's content according to your preference (e.g., by Project, by Issue Type, etc.), taking into account the way they are currently sorted on your Jira view.

XLSX templates can't have page breaks, so that option isn't displayed when you have selected a template of that type.

On the *Maximum number of issues*, replace the default value with **2**, and on the *Maximum number of simultaneous requests* replace it with **1** and click **Save**.



If you try to perform a bulk export containing more issues than the value set in *Maximum number of issues*, an *Error! The number of selected issues is above the maximum allowed (<value>)* will be displayed when you try to bulk export them.

Also, if the bulk export operations request quantity is bigger than the set *Maximum number of issues*, an *Error! The number of export requests running has exceeded its limit.* will be displayed when you try to bulk export them.



Xporter for Jira Cloud

The *Maximum number of simultaneous requests* feature is not available in the Xporter for Jira Cloud.

Global Permissions

Here, you can Enable/Disable options related to enforcing the *Permission Scheme* configuration, display the *Xporter panel on Single issue view*, *Allow anonymous requests* and *Including Attachments* of the issue on generated documents.

Global Permissions

- Enable Xporter for JIRA for all projects and all users ☒ On ☐ Off
This option will override the permission scheme configuration. The add-on functionality will be available for all users and all the templates will be available for every issue.
- Enable Xporter for JIRA panel on Single Issue View ☐ On ☒ Off
This option will allow the issue to be exported from Xporter panel in Single Issue View.
- Allow anonymous requests ☐ On ☒ Off
This option allows unauthenticated clients to invoke the Xporter for JIRA Servlet. Use carefully, when this option is on, it can be use to export issue information without proper permissions.
- Include Attachments ☒ On ☐ Off
This option add the issue attachments to the exported document when exporting in single issue mode and the output format is set to pdf.

We'll explore Permission Schemes thoroughly in our next exercise. For now, just tick the **On** option on *Enable Xporter for Jira for all projects and all users* for now and click **Save**.



For more information regarding Permission Schemes, please check our documentation [here](#).

The *Enable Xporter for Jira panel on Single Issue View* allows displaying a panel on the right sidebar of a single issue page to allow exporting without leaving its page. Leave this option **Off** in the meantime.

Enabling the *Allow anonymous requests* option lets unauthenticated users to invoke the Xporter for Jira Servlet, so be aware of the security risk. Leave it **Off** for now, too.

Finally, enabling *Include Attachments* means when exporting a single issue with its output format set to PDF, if the issue has any attachments, they will also be attached to the generated document. Make sure it is **On** and click **Save**. An alert dialog will prompt you, informing that *this option can decrease Xporter for Jira performance*. Just **Confirm** and you're done.

Jira Service Desk

JIRA Service Desk

Enable Xporter for ☒ On ☐ Off

JIRA Service Desk This option will turn Xporter available on JIRA Service Desk portal.

Enable Xporter for Jira Service Desk allows your Service Desk Customer to get their tickets printed on documents. All templates available are defined by you when you set the Scope list by template.

With all the initial set up configurations finished, we just need a template to start exporting our generated documents. Luckily, there's a **Template Store** entry on the Xporter for Jira administration section displayed on the left sidebar.

Administration Search JIRA admin

Applications Projects Issues **Add-ons** User management System

ATLASSIAN MARKETPLACE
Find new add-ons
Manage add-ons

XPORTER FOR JIRA
Global Settings
Templates
Template Store
Scheduled Reports
Permission Schemes
File Servers
Post Function Authentication
License Management
Documentation

Find Xporter for JIRA Templates

THE QUICK AND EASY WAY TO EXPORT YOUR ISSUES
—
WORD · PDF · EXCEL
xpanditions

Welcome to the Xporter for JIRA Template Store. Discover powerful templates for exporting your issues.
If you want to share your template with the Xporter for JIRA community, send your template to file.jiraxporter@xpand-it.com.

Search

Issue Details with Cover Page ★★★★★ (28) Reinstall
Author: Xpand IT 534 Downloads
Published: 2015-01-18 **Free**
SINGLE ISSUE

A template with a cover page, exports issue fields, sub-tasks, linked issues, comments and images. This template has been designed to be used in single issue export. It can be used in multiple issues export, but the cover page will be shown as many times as the issues being exported.

Issue Details with QR Code ★★★★★ (16) Install
Author: Xpand IT 214 Downloads
Published: 2015-01-18 **Free**



Along with user-created templates, Xporter for Jira provides a **Template Store** where you can find and install templates provided by our team. Just select one that you like, click **Install** and you are good to go.

Navigate to the **Template Store**, search for **Issue Details with Cover Page**, click **Install** and repeat the process for **Issue Detail Excel**.

The Exercise(s)

1) Exporting a Single Issue

Edit Comment Assign More To Do In Progress Workflow Admin Export

Details

Type: ☒ Task Status: **TO DO**
Priority: ☒ Medium (View Workflow)
Labels: None Resolution: Unresolved

People

Assignee: Le Develop Assign to me
Reporter:


Xporter for JIRA
XML
Word
Printable

In order to export your first document, just navigate to an issue of your choosing on your Jira instance. There, click the *Export* dropdown menu, select **Xporter for Jira** and you will navigate to a page titled *Export issues using Xporter for Jira* where you can select the *Template* and *Output format* of your generated document. It will be **PDF** by default, as we set it up previously.

Export issues using Xporter for JIRA


Template: Issue Details with Cover Page ▼

Output format: DOCX ▼

 Export Back to Issue

Select the **Issue Details with Cover Page** template. Since it is a DOCX template, the Output format available options will only display **PDF** and **DOCX**. Choose **Issue Detail Excel** instead; that will change to **PDF** and **XLSX**.

Xporter for JIRA

 **Success!**
Export completed successfully. The file can be downloaded [here](#).

100% complete. Last updated at 07-02-2017 14:09:25.

Started 07-02-2017 14:09:23

Back to Issue

Select **Issue Detail Excel** and XLSX as the Output format. Click **Export**, and after the progress bar is filled, click the **here** on the *Success!* message to download your generated file. Open it and you'll see your Jira native fields populated on the document.

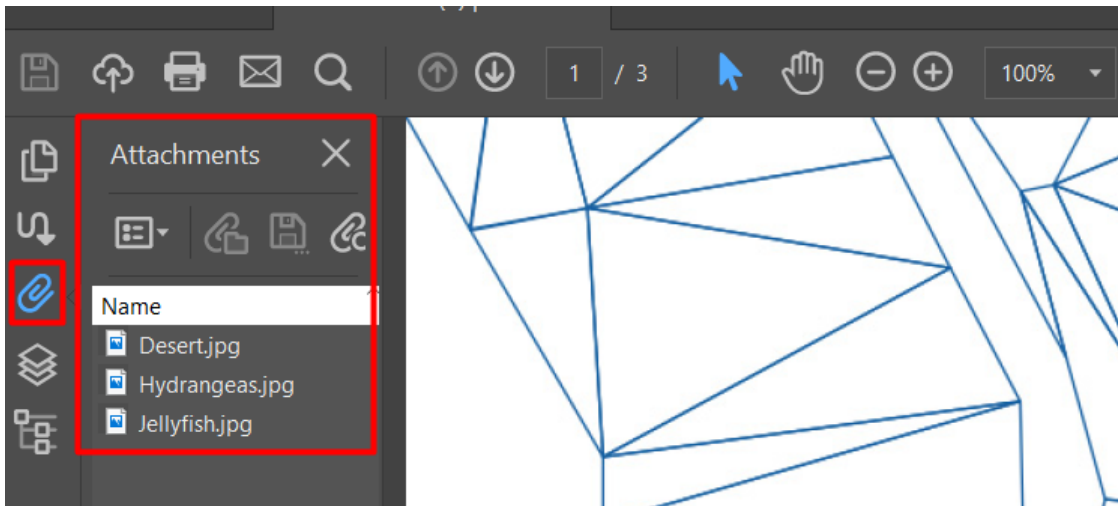
• Exporting a Single Issue with included Attachments

Edit Comment Assign More ▼ To Do In Progress Workflow ▼ Admin ▼ Export ▼

Details
Type: ☒ Task
Priority: ↑ Medium
Labels: None
Description

Xporter for JIRA
Template: Issue Details with Cover Page ▼
Output format: PDF ▼
Export

Now, on a new browser tab, return to the Xporter for Jira administration section Add-ons page of the Jira Administration. On the *Enable Xporter for Jira panel on Single Issue View*, tick **On** and click **Save**. Return to the previous tab, click *Back to Issue*, and now the *Xporter for Jira* panel will be displayed on the right sidebar of the issue. This time, add two attachments of your choosing to the issue. Then, select the **Issue Details with Cover Page** template with the **PDF** output and click **Export**. Open the generated file with a PDF reader and you'll see your generated document along with the attached issue files.



PDF note

The browser-embedded PDF viewers don't allow you to check the PDF attachments, so we suggest using a standalone PDF reader like Adobe Acrobat, and check the attachments on the left sidebar.

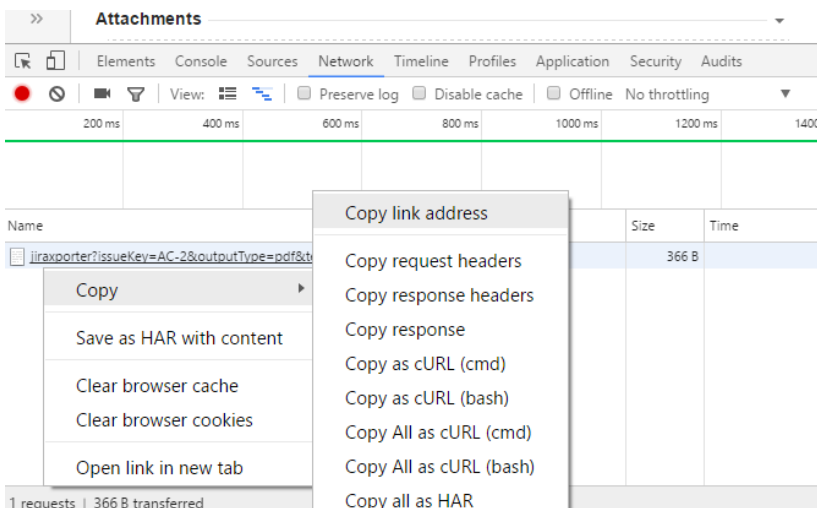
2) Exporting a Single Issue invoking the Xporter for Jira servlet



Browser info

The following steps are based on the *Google Chrome* interface

On your issue page, press **F12** to display the browser console and go to the *Network* tab. Click **Export** on the *Xporter for Jira* panel and a new entry will appear on the *Network* console. Right-click it, and navigate to *Copy* -> *Copy link address*.



Open a new browser tab, paste the link and click *Enter*. The file will be generated.

Now, open a new browser window in Incognito mode (press **Ctrl + Shift + n** on your keyboard), paste the same link and click *Enter*. An error page will be displayed, and by expanding the *Request assistance* option, you will see **Invalid permissions** under *Cause*.



Sorry, we had some technical problems during your last operation.

[> Request assistance](#)

[Return to the previous page](#)

Return to the tab with Xporter for Jira administration section Add-ons page of the Jira Administration, and on the **Allow anonymous requests**, tick **On**, click **Save**, and confirm the alert dialog prompt. Repeat the action on the Incognito mode browser window, and the file will now be generated.

3) Exporting a Bulk of Issues

Return to your Jira issue page tab, and on the Jira top bar, select *Issues* -> *Search for Issues*. Make sure more than **2** issues are displayed. Click the **Export** dropdown menu on top of the search bar, select **Xporter for Jira** and you will navigate to a page where you will see an *Error!* message informing you *The number of selected issues is above the maximum allowed (2)*.

T	Key	Summary	Assignee	Reporter
	SOLO-4	Le Improvement	Unassigned	Le Boss
	SOLO-3	Le Task	Le Developer	Le Boss
	SOLO-2	Le Bug	Unassigned	Le Boss
	SOLO-1	Le New Feature	Unassigned	Le Boss

Return to the tab with Xporter for Jira administration section Add-on page of the Jira Administration. On the *Maximum number of issues*, replace the default value with **10000**, and click **Save**.

Back to the Issue Navigator, make sure less than 10000 issues are displayed, click the **Export** dropdown menu on top of the search bar, select **Xporter for Jira** and you will navigate to a page where you can only select the *Template* and *Output format* of your generated document if the **XLSX Issue Detail Excel** template is selected, and the additional *Break pages* selector with its set default option (*Issues*) if the **Issue Details with Cover Page** template is selected instead.

Export the **Issue Details with Cover Page** template with the *Output format* as **Docx** and the *Break pages* selector with its set default option (*Issues*). After downloading, open it and you'll see that all issues are printed, each starting after a page break.

Beak Pages info

If you select **Projects** on the *Break Pages*, a break occurs only when an issue belongs to a different project than the previous one on the stack of issues to be printed.

The same logic is used for **Issue Types** (when an issue is from a different Issue type than the previous one on the stack of issues to be printed) and **Components** (when an issue is associated with different components than the previous one on the stack of issues to be printed).

Also, if you open two browser windows on the Issue Navigator and try to bulk export on the second window while the same action is being performed on the first window, an *Error! The number of export requests running has exceeded its limit.* will be displayed in the second window. If you return to the tab with Xporter for Jira administration section Add-ons page of the Jira Administration, and on the *Maximum number of simultaneous requests* replace the default value with **10**, click **Save**, and repeat, no error message will be displayed this time.

4) Working with the Enable Xporter for Jira for all projects and all users option



This option will be explored in detail on a later [exercise](#). For now, there's a simple exercise to test it.

Also, this exercise assumes you currently don't have a Permission Scheme configuration.

Navigate to the tab with Xporter for Jira administration section Add-ons page of the Jira Administration, and on the *Enable Xporter for Jira for all projects and all users*, tick **Off** and click **Save**.

Now, visit an Issue page and you'll notice the *Xporter for Jira* panel will now be missing since no Permission Scheme is configured to allow you to use Xporter. Also, on the Issue Navigator, if you try to bulk export, an *Error!* message will inform you that you are *Unable to export the selected issues*. If you check the details, you will be informed on the *Error Reporting* pop-over that the *User has no permissions for using Xporter for Jira in current Permission Scheme* for each of the issues you tried to bulk export.

Return to the tab with Xporter for Jira administration section Apps page of the Jira Administration, and on the *Enable Xporter for Jira for all projects and all users*, tick **On** again and click **Save**.

Exercise 1 is now complete. Proceed to Exercise 2 to learn how to manage Xporter Templates.



If you like this exercise, please leave a comment or a 👍. Your feedback is very important to us.

Thank you in advance.

Enjoy our product. 😊