Exercise 3 - How to Manage Workflow Post Functions

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Introduction

This is the third exercise of the Advanced Level. The main goal of this exercise is to show you how to set up and manage Xporter for Jira Workflow Post Functions.

Workflow Post Functions allow administrators to set parameters that will make the *Xporter for Jira Create Document Post Function* automatically generate documents based on the Status Transitions of issues, along with customizations of File Names and File destinations.

(i)	For further information please check our documentation here.
	For more information on Jira Workflow Post Functions, please refer to the Atlassian documentation here.

In order to perform the initial setup, on Jira Administration navigate to **Issues**, click **Workflows** on the sidebar, and **Edit** the Workflow of the **Academy** Project. On the next page, select to show the workflow as **Text**, and on *Step Name (id)* **To Do**, under the *Transitions (id)* column, click **In Progress**. On the next page, click the **Post Functions** tab and then **Add post function**.

Administration	Search JIRA admin
Applications Projects	Issues Add-ons User management System
Add Parameters To F	unction
Add required parameters t	o the Function.
Template:	Issue Details Excel Choose the template that will be used in the post function
Output format:	
Attach File:	On Off Choose if the result file will be or not attached to the current issue
Use same file name:	\bigcirc On \circledast Off Choose if the file that will be attached will have the same file name defined below.
Attachment file name:	\$Updated transition.pdf
	Provide the name for the file that will be attached to issue.
Filename:	\jira\Post Function Reports\document_\$Key_\$Status.pdf Provide the complete name for the file that will be generated, including the complete path
Upload File:	
	Add Cancel

On the Add Post Function To Transition page, the following will be displayed, along with other options:

- the Xporter for Jira Create Document Post Function selector, to create a document and define where to save the generated file
- the Xporter for Jira Send Report Post Function selector, to create a document and send the generated file by Email

In order to perform this exercise properly, you'll make use of the File Servers created on the How to Manage File Servers exercise, as well as a Jira SMTP mail server configured to send emails.
 For more information on how to create a Jira SMTP mail server, please refer to the Atlassian documentation here.
 Workflow Post Functions are not limited by Permission Schemes.

1) Adding an Xporter for Jira Create Document Post Function

On the Add Post Function To Transition page of the transition mentioned earlier, tick the Xporter for Jira Create Document Post Function option and Parameters page will be displayed.

Applications Projects	Issues Add-ons User management System		
Add Parameters To F	unction		
Add required parameters 1	o the Function.		
Template	Issue Details Excel		
	Choose the template that will be used in the post function		
Output format	PDF V		
	Choose the output format for the file that will be generated in the post function		
Attach File:	🖲 On 🔍 Off		
	Choose if the result file will be or not attached to the current issue		
Use same file name:			
	Choose if the file that will be attached will have the same file name defined below.		
Attachment file name:	*opation telefinition.pai		
	Provide the name for the file that will be attached to issue.		
Filename	accounter Testage ber		
	Provide the complete name for the file that will be generated, including the complete path		
Upload File:	On Off Choose where you want to save your document, locally or on a remote server.		
511 0			
File Server	Academy Confluence Choose the server that will be used in the post function.		
	Add Cancel		

You can include mappings in the filename, the same mappings that are used inside the templates, with a slightly different notation: start with \$ and the name of the field. Examples:

- /jira/document \$Key.pdf
- /jira/document_\$Key_\$Updated.pdf
- /jira/document_\$Key_\$Updated_\$Status.pdf

1.1 Saved locally

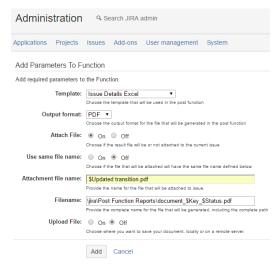
Select any Template and Output from the selectors.

Turn On Attach File so that the generated document will be attached to its issue.

Turn Off Use same file name so that the generated document that will be attached to its issue will have a name distinct from the one that will be saved locally/uploaded to a File Server.

On Attachment file name, enter **\${Updated}** transition. Notice that the file extension will be added automatically, based on the Output format previously selected.

The *Filename* is where we define the name of the generated document that will be saved locally. Enter /jira/Post Function Reports /document_\$Key_\$Status since we want it to be saved locally on the path /jira/Post Function Reports/. Notice that the file extension will be added automatically, based on the *Output format* previously selected.



The mappings in the filename are restricted by the maximum characters allowed. If the size of the filename is too long, the file will not be created.

Click Add, and as you're navigated back to the Transtion page, your Workflow Post Function is now displayed under Post Functions.

At the top of your current page, click Publish Draft, and then Publish.

ISSUE TYPES	You are editing a draft v	vorkflow. Publish Draft Discard Draft View	original		
Issue types					
Issue type schemes	Workflows				
Sub-tasks	Copy of Software Simple	Copy of Software Simplified Workflow for Project PROJ / DIATE SHARED BY I PROJECT (C)			
WORKFLOWS	Generated by JIRA Software vers Workflow for Project PROJ' was n		is managed internally by JIRA Software. Do not	manually modify this workflow. (This copy was automatically generated from a draft, when workflow 'Software	Simplified
Workflows	finite for report rive has h	ado mastro.)			
Workflow schemes	This draft was last edite	d by you at 21/Feb/17 1:52 PM.			
SCREENS					
Screens	Diagram Text Export -				
Screen schemes	Diagram Text Export +				
Issue type screen schemes	Step Name (id)	Linked Status	Transitions (id)	Actions	
	To Do (1)	TO DO	To Do (11)	Add transition Edit View Properties	
FIELDS			>> To Do		
Custom fields			In Progress (21) >> In Progress		
Field configurations			Done (31)		
Field configuration schemes			>> Done		
ISSUE FEATURES	In Progress (6)	IN PROGRESS	To Do (11)	Add transition Edit View Properties	
Time tracking			>> To Do In Progress (21)		
Issue linking			>> In Progress		
raade inning			Done (31)		
ISSUE ATTRIBUTES			>> Done		
Statuses	Done (11)	DONE	To Do (11)	Add transition Edit View Properties	
Resolutions			>> To Do In Progress (21)		
Priorities			>> In Progress		
			Done (31)		
Issue security schemes			>> Done		

Then, navigate to an issue of the Academy project with the Status To Do and click Start Progress.

After that action, check the issue attachments. The generated file will be attached to the issue named as you've defined.

1.2 Updated to a File Server

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Select any Template and Output from the selectors.

Turn On Attach File so that the generated document will be attached to its issue.

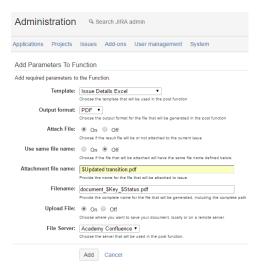
Turn Off Use same file name so that the generated document that will be attached to its issue will have a name distinct from the one that will be saved locally/uploaded to a File Server.

On Attachment file name, enter **\${Updated}** transition. Notice that the file extension will be added automatically, based on the Output format previously selected.

The *Filename* is where we define the name of the generated document that will be uploaded to a File Server. Just add the filename (e.g., document_\$Key_\$Status). Notice that the file extension will be added automatically, based on the *Output format* previously selected.

Turn **On** Upload File, and on the File Server selector below, pick the **Academy Confluence** we've set up in the How to Manage File Servers exercise. (You can pick the Academy FTP instead, just make sure to check the generated file there after the workflow transition).

A The mappings in the filename are restricted by the maximum characters allowed. If the size of the filename is too long, the file will not be created.



Click the Add button, and as you're navigated back to the Transition page, your Workflow Post Function is now displayed under Post Functions.

At the top of your current page, click Publish Draft, and then Publish.

ISSUE TYPES ISSUE types ISSUE type schemes Sub-tasks WORKFLOWS WorkfLows	pes If the dial of out and exclusing a dual working poles that the output and the				
Workflow schemes SCREENS Screens Screen schemes	CREENS Diagram Text Export Export				
Issue type screen schemes	Step Name (id)	Linked Status	Transitions (id)	Actions	
FIELDS Custom fields Field configurations Field configuration schemes	To Do (1)	(<u>to do</u>)	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit. View Properties	
ISSUE FEATURES Time tracking Issue linking ISSUE ATTRIBUTES	In Progress (6)	IN PROGRESS	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit. View Properties	
Statuses Resolutions Priorities Issue security schemes	Done (11)	DONE	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit View Properties	

Navigate to an issue of the Academy project with the Status To Do and click Start Progress.

After that action, check the issue attachments. The generated file will be attached to the issue named as you've defined.

Also, check the local path on your machine hosting Jira as well as the Space page you've defined on your **Academy Confluence** File Server. There, you'll find the generated report, named as you defined it.

2) Adding a Xporter for Jira Send Report Post Function

On the Add Post Function To Transition page of the transition mentioned early, tick the Xporter for Jira Send Report Post Function option and the Parameters page will be displayed.

Adn	ninistration Q Search JIRA admin	
Applica	tions Projects Issues Add-ons User managemen	t System
Add F	Post Function To Transition	
	Name	Description
	Assign to Current User	Assigns the issue to the current user if the current user has the 'Assignable User' permission.
۲	Assign to Lead Developer	Assigns the issue to the project/component lead developer
۲	Assign to Reporter	Assigns the issue to the reporter
۲	Create Perforce Job Function	Creates a Perforce Job (if required) after completing the workflow transition.
	Fire Event	Fires an event that can be processed by listeners.
	Generate Change History	Updates change history for an issue and stores the issue to the database.
۲	Notify HipChat	Send a notification to one or more HipChat rooms.
۲	Trigger a Webhook	If this post-function is executed, JIRA will post the issue content in JSON format to the URL specified
۲	Update Issue Field	Updates a simple issue field to a given value.
۲	Update Issue Status	Sets issue status to the linked status of the destination workflow step.
۲	Xporter for JIRA Create Document Post Function	Create a document based on the issue fields.
0	Xporter for JIRA Send Report Post Function	Send a report by email.

Add Cancel

Select any Template and Output from the selectors.

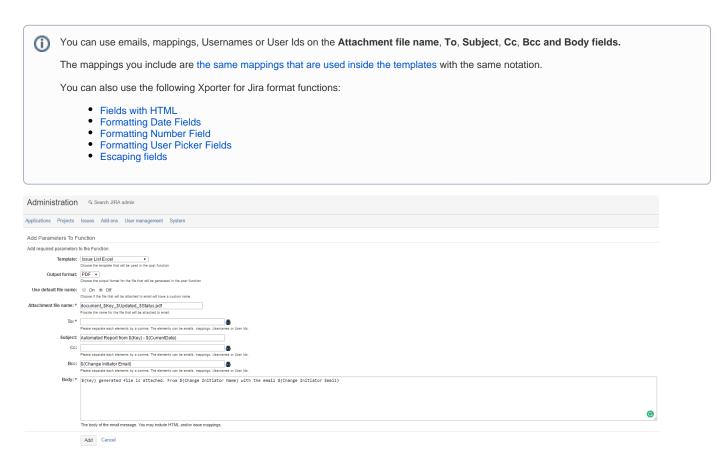
Turn Off Use default file name so that we can customize the name of our generated document.

On Attachment file name, enter **document_\$Key_\$Updated_\$Status.** Notice that the file extension will be added automatically, based on the Output format previously selected.

Enter your email address in *To.* On the *Subject*, enter **Xporter Report from \${Key} - \${CurrentDate}.** On *Cc*, open the User Picker next to it and select your Jira User.

Enter \${Change Initiator Email} on Bcc.

On the Body, enter \${Key} generated file is attached. From \${Change Initiator Name} with the email \${Change Initiator Email}.



Click the Add button, and as you're navigated back to the Transition page, your Workflow Post Function is now displayed under Post Functions.

Navigate to an issue of the Academy project with the Status To Do and click Start Progress.

After that action, check your email, and you'll find its Subject and Body filled as you've defined, along with the generated Report as an attachment.

Congratulations! You've completed the Advanced level 🙂

0	D	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. 😃