

# Templates Management

- [Managing Templates](#)
- [Template Details](#)
  - [Template Scopes](#)
- [Template Store](#)

## Managing Templates



### Template management on project level

Xporter 6 provides a way to manage templates on the project level. Project administrators don't need to depend on Jira Administration to manage their templates. Read more [here](#).

The template management screen allows administrators to add, edit and delete templates that will be available for all projects.















The operations available on this screen are:

- **Add Template:** Allows you to create a new template.
- **Store:** With this option, you'll be able to install sample templates from the [Xporter Template Store](#) directly from this screen.
- **Search:** Allows quick access to the template you want by searching for the template name or filename.
- **Edit Template:** Allows you to change an existing template, changing the template details or even the template file.
- **Delete Template:** Allows you to delete a template.
- **Download Template:** Allows you to download the template file. This operation is available in the hyperlink with the template file name.
- **Set Template as Default:** Allows you to set a template as the default one. It will be selected when users open the issue view screen.
- **Remove Template as Default:** Allows you to remove a template as the default.

## Template Details

Each template has the following attributes:

- **Name:** The name that is displayed to the users in order to select the template to export the issue(s) information.
- **Description:** Here you can describe what is the goal of the template up to a maximum of 500 characters.
- **Scopes:** Scope where the template will be available to create a new report.
- **Output formats:** The list of template formats available.
- **Default output format:** The default output format when the template is selected to be used.
- **Default break page type:** The default value for the break page type.
- **Attach Files:** Define if Xporter should or should not include issue attachments.
- **File:** The file with the template content. The following formats are supported:
  - DOCX (Word Document)
  - DOCM (Word Document with Macros)
  - DOTX (Word Template)
  - DOTM (Word Template with Macros)
  - XLSX (Excel Document)

Templates				
<input type="text" value="Search..."/>		<a href="#">+ Add</a> <a href="#">Store</a>		Show 10 entries
	Details	Active Scopes	Last Modified	Operations
	<b>Basic Release Notes</b> <b>BasicReleaseNotes.docx</b> <small>A template that can be used to produce friendly release notes with tables for each issue type of the release.</small> <a href="#">FILE UPLOAD</a>	ATTACHMENTS ENABLED AGILE RELEASES AUTOMATION FOR JIRA	Jira Admin (admin) 2020-06-02 18:11	
	<b>Demo</b> <b>key.txt</b> <small>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam pretium fringilla pulvinar. Nullam congue felis eget eros fringilla, sit amet rutrum r...</small> <a href="#">Show more</a> <a href="#">FILE UPLOAD</a>	ATTACHMENTS ENABLED NOWHERE	Jira Admin (admin) 2020-06-05 10:20	
	<b>Epic Stories and Subtasks</b> <b>EpicsStoriesAndSubtasks.docx</b> <small>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam pretium fringilla pulvinar. Nullam congue felis eget eros fringilla, sit amet rutrum r...</small> <a href="#">Show more</a> <a href="#">FILE UPLOAD</a>	ATTACHMENTS ENABLED EVERYWHERE	Jira Admin (admin) 2020-06-05 10:20	
	<b>Excel Cards</b> <b>ExcelCards.xlsx</b> <small>This is a template that you can use to print Cards to be used in your Scrum Boards, based on your JIRA issues. It can be used both for single issue ex...</small> <a href="#">Show more</a> <a href="#">FILE UPLOAD</a>	AGILE BOARDS AGILE RELEASES BULK EXPORT <a href="#">Show more</a>	Jira Admin (admin) 2020-05-04 11:55	
	<b>Filter Results with Cover Page</b> <b>TableOfIssues.docx</b> <small>This template is intended to be used in multiple issues export. It displays a cover page and exports all the issues selected in a filter to a table. W...</small> <a href="#">Show more</a> <a href="#">FILE UPLOAD</a>	AGILE BOARDS AGILE RELEASES BULK EXPORT SCHEDULE REPORTS	Jira Admin (admin) 2020-04-06 16:37	
	<b>Issue Details Excel</b> <b>IssueDetailsExcel.xlsx</b> <small>Exports issue information to an excel sheet, including subtasks, linked issues and worklogs. This template only works with Xporter 4 and above.</small> <a href="#">Show more</a> <a href="#">FILE INSTALL</a>	ATTACHMENTS ENABLED AGILE BOARDS AGILE RELEASES BULK EXPORT <a href="#">Show more</a>	Jira Admin (admin) 2020-04-28 15:26	
	<b>Issue Details with Cover Page</b> <b>IssueDetailsWithCover.docx</b> <small>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 singl...</small> <a href="#">Show more</a> <a href="#">FILE UPLOAD</a>	SINGLE EXPORT WORKFLOW POST FUNCTIONS	Jira Admin (admin) 2020-04-16 12:09	

- XLSM (Excel Template with Macros)
- ODT (Open Office Document)
- RTF (Rich Text Format)
- CSV (Comma-separated values)
- TXT (Text File)

## Edit Template

Name

Basic Release Notes

Template identification when creating a report

236 characters remaining.

Description

A template that can be used to produce friendly release notes with tables for each issue type of the release.

Brief description of the template

391 characters remaining.

Scopes

Agile Releases

This template will be available on these scopes

File

Choose File

Choose template file

Advanced

Output Formats

DOCX ODT PDF PDF/A PNG RTF SVG

This template will have the following output formats available

Default Output Format

DOCX

This option is the default values that Xporter will use as output format

Default Page Break Type

Never

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

Attach Files

Off

On

Include the issue attachments to the export document

Update

Cancel

## Template Scopes

Template scopes define where the template will be available. The following scopes are available:

Scope	Location
Xporter Reports	Xporter Reports feature
Bulk Export	Multiple Issues export (Issue Navigator screen) or Bulk action
Schedule Reports	Xporter Schedule Reports
Single Export	Issue detail screen
Workflow Post Functions	Xporter workflow post-functions
JSD Request Detail	Jira Service Desk Request detail screen
JSD Request List	Jira Service Desk My Requests detail screen
Structure	Structure (ALM Works app)
JSD Queues	Jira Service Desk Queues (Agent view)
Agile Boards	This scope refers to Backlog and Active Sprint and Kanban
Agile Releases	Manage Release on Agile/Kanban boards. Xporter is available on Release list and detail screen.



Note: If you want to remove Scheduled Reports or Workflow Post Functions from the template, you first have to check if the template is not being used in these scopes.

## Edit Template

**Name** \*

Basic Release Notes

Template identification when creating a report 236 characters remaining.

**Description**

A template that can be used to produce friendly release notes with tables for each issue type of the release.

Brief description of the template 391 characters remaining.

**Scopes**

Agile Releases x Schedule Reports x

- Agile Boards
- Bulk Export
- JSD Queues
- JSD Request Detail
- JSD Request List
- Single Export
- Workflow Post Functions

This template will have the following output formats available

**Default Output Format**

DOCX

This option is the default values that Xporter will use as output format

**Default Page Break Type**

Never

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

**Attach Files**

Off ☒ On

Include the issue attachments to the export document

Update Cancel

## Template Store

Xporter provides another way to get awesome templates. Use the Template Store to access and install free templates provided by us.

The Store is available on the Templates Page.

Templates

Q Search...

+ Add

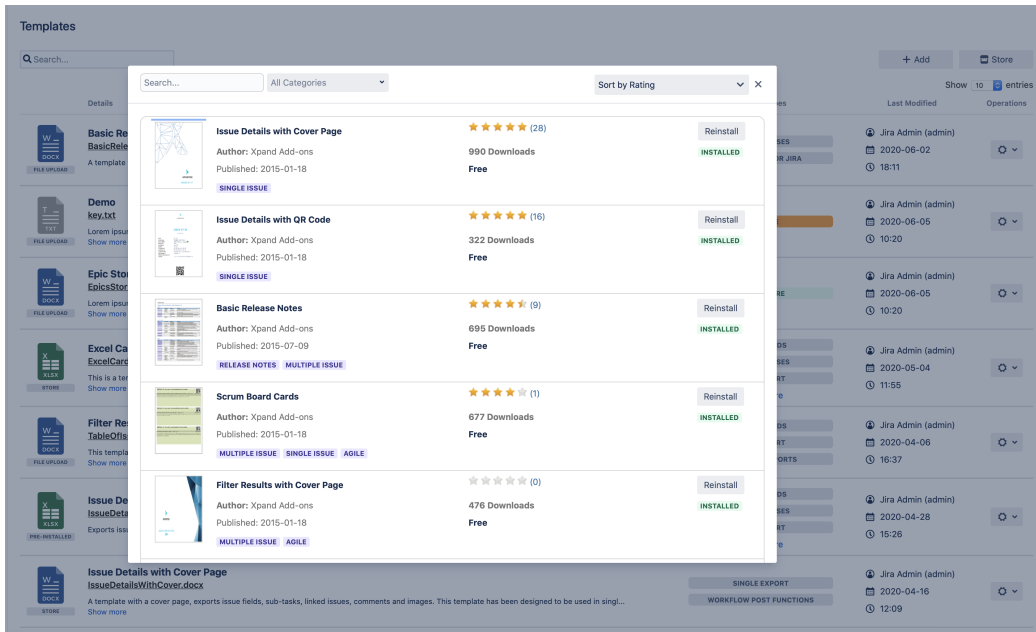
Store

Show 10 entries

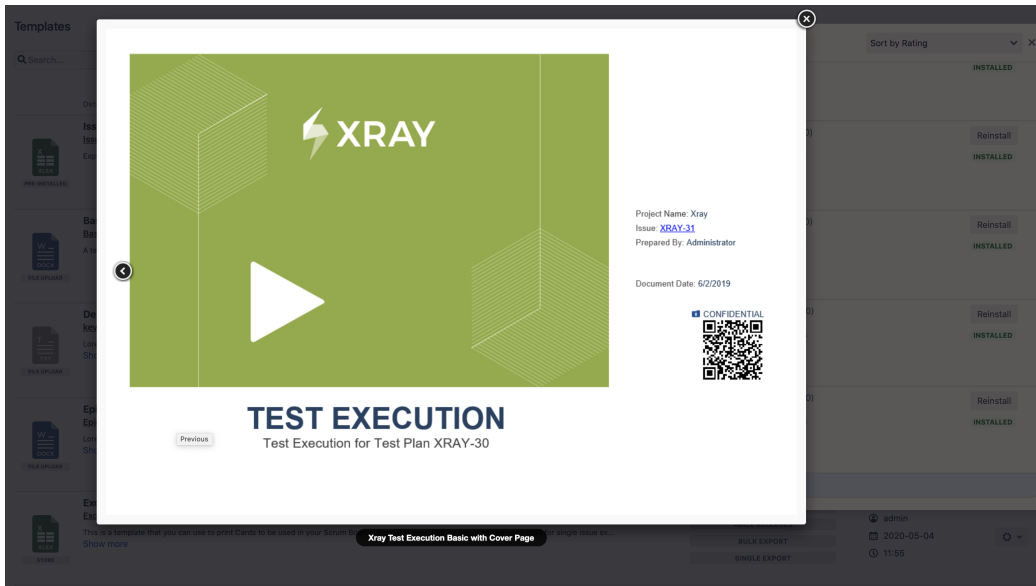
Operations

Details	Active Scopes	Last Modified	
<div><div><div><div>Word document icon</div><div>Basic Release Notes</div><div>BasicReleaseNotes.docx</div></div><div><div>File upload</div></div></div><div>A template that can be used to produce friendly release notes with tables for each issue type of the release.</div></div>	<div>ATTACHMENTS ENABLED</div> <div>AGILE RELEASES</div> <div>AUTOMATION FOR JIRA</div>	<div>Jira Admin (admin)</div> <div>2020-06-02</div> <div>18:11</div>	<div></div>
<div><div><div><div>Text file icon</div><div>Demo key.txt</div></div><div><div>File upload</div></div></div><div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam pretium fringilla pulvinar. Nullam congue felis eget eros fringilla, sit amet rutrum r...</div><div>Show more</div></div>	<div>ATTACHMENTS ENABLED</div> <div>NOWHERE</div>	<div>Jira Admin (admin)</div> <div>2020-06-05</div> <div>10:20</div>	<div></div>
<div><div><div><div>Word document icon</div><div>Epic Stories and Subtasks</div><div>EpicStoriesAndSubtasks.docx</div></div><div><div>File upload</div></div></div><div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam pretium fringilla pulvinar. Nullam congue felis eget eros fringilla, sit amet rutrum r...</div><div>Show more</div></div>	<div>ATTACHMENTS ENABLED</div> <div>EVERYWHERE</div>	<div>Jira Admin (admin)</div> <div>2020-06-05</div> <div>10:20</div>	<div></div>
<div><div><div><div>Excel spreadsheet icon</div><div>Excel Cards</div><div>ExcelCards.xlsx</div></div><div><div>Store</div></div></div><div> This is a template that you can use to print Cards to be used in your Scrum Boards, based on your JIRA issues. It can be used both for single issue ex...</div><div>Show more</div></div>	<div>AGILE BOARDS</div> <div>AGILE RELEASES</div> <div>BULK EXPORT</div> <div>Show more</div>	<div>Jira Admin (admin)</div> <div>2020-05-04</div> <div>11:55</div>	<div></div>
<div><div><div><div>Word document icon</div><div>Filter Results with Cover Page</div><div>TableOfIssues.docx</div></div><div><div>File upload</div></div></div><div> This template is intended to be used in multiple issues export. It displays a cover page and exports all the issues selected in a filter to a table. W...</div><div>Show more</div></div>	<div>AGILE BOARDS</div> <div>BULK EXPORT</div> <div>SCHEDULE REPORTS</div>	<div>Jira Admin (admin)</div> <div>2020-04-06</div> <div>16:37</div>	<div></div>
<div><div><div><div>Excel spreadsheet icon</div><div>Issue Details Excel</div><div>IssueDetailsExcel.xlsx</div></div><div><div>File upload</div></div></div><div> Exports issue information to a excel sheet, including subtasks, linked issues and worklogs. This template only works with Xporter 4 and above.</div></div>	<div>ATTACHMENTS ENABLED</div> <div>AGILE BOARDS</div> <div>AGILE RELEASES</div> <div>BULK EXPORT</div> <div>Show more</div>	<div>Jira Admin (admin)</div> <div>2020-04-28</div> <div>15:26</div>	<div></div>
<div><div><div><div>Word document icon</div><div>Issue Details with Cover Page</div><div>IssueDetailsWithCover.docx</div></div><div><div>Store</div></div></div><div> 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 singl...</div><div>Show more</div></div>	<div>SINGLE EXPORT</div> <div>WORKFLOW POST FUNCTIONS</div>	<div>Jira Admin (admin)</div> <div>2020-04-16</div> <div>12:09</div>	<div></div>

The Store will be displayed in the dialogue and allows you to check, install and re-install all of the available templates.



Furthermore, the template store also shows a thumbnail with the report generated based on the template selected.



Feel free to check our template store, explore all the samples available and use them as a base for your templates.

 If you want your template to be available in our Template Store, share it with us via [Support Portal](#).

