

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

- [Introduction](#)
 - [Getting Started](#)
 - [Configure](#)
 - [Install the first template](#)
- [Exercises](#)
 - [Exporting a Single Issue](#)
 - [Exporting a Single Issue with attachments](#)
 - [Exporting a Bulk of Issues](#)
 - [Working with the Enable Xporter for all projects and all users option](#)

Introduction

In this exercise we will introduce Xporter, some available configurations and how we can use it export data from Jira.

Immediately after installing the Xporter app, you will be redirected to *Getting Started with Xporter*.

Getting Started

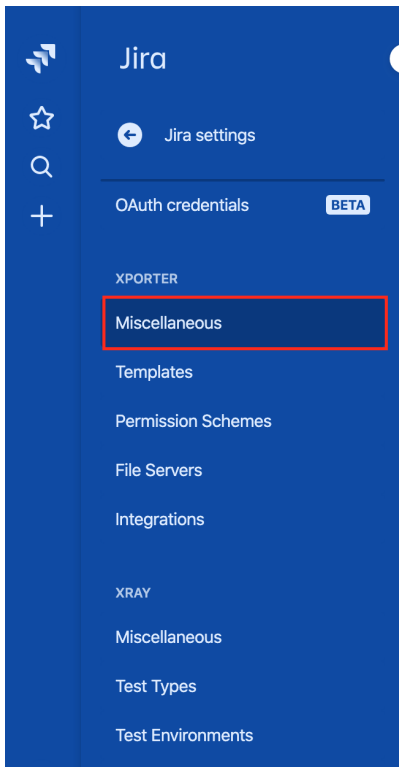
Here we show an overview of Xporter and explain a bit of the fundamental concepts.

We cover the general configurations, the templates management and the exporting options.

- **Miscellaneous**
 1. Global Permissions
 2. Xporter Visibility
- **Templates**
- **Exporting**
 1. Single
 2. Bulk
 3. Automation
 4. Others

The screenshot shows the Jira Xporter app interface. On the left is a blue sidebar with navigation links: 'Jira', 'Back', 'Xporter', 'Getting Started', 'Integrations', and 'Documentation'. The main content area is white and features a 'Getting started with Xporter' section. This section includes a title, a subtitle 'Export issues from Jira to Word, Excel and PDF: 3 basic steps', and a description. Below the description is a 'Miscellaneous' section with a link to 'Global Permissions' and a paragraph explaining the app's configuration options. A red circle highlights the 'Export' button in the top right corner of the main content area.

Configure



Miscellaneous

Global Permissions

Enable Xporter for all projects and all users ☒

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.

Xporter Visibility

Enable Xporter panel on Single Issue View ☒

This option will allow the issue to be exported from Xporter panel in Single Issue View.

Enable Xporter on Customer Portal Request Detail ☒

This option will make Xporter available on Jira Service Desk Customer Portal - Request detail.

Enable Xporter on Customer Portal My Requests ☒

This option will make Xporter available on Jira Service Desk - My Requests.

Enable Xporter on Agile Boards ☒

This option will make Xporter available on Agile Boards.

Enable Xporter on Jira Home menu ☒

This option will make Xporter available in the Jira Home menu.

Save

Navigate to **Miscellaneous** page on Jira Administration, the general configuration page and you'll see its major sections:

- Global Permissions
- Xporter Visibility

The **Global Permissions** allow administrators to use permission schemes to manage permissions between the Jira users.

This option will override the permission scheme configurations and Xporter functionalities will be available for all users and every issue.

The **Xporter Visibility** allow administrators to define where Xporter should appear on Jira.

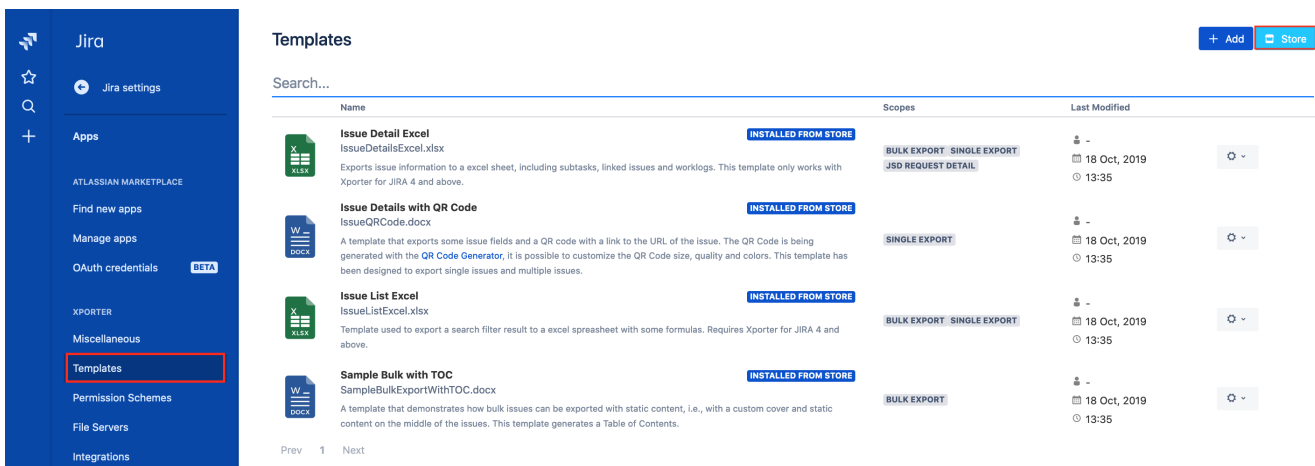
Some locations like Service Desk, Single Issue View or Agile Boards can be hidden with this configuration.

Install the first template

With all the initial setup configuration finished, we just need a template to start exporting some issues.

Luckily, there's a **Store** on the **Templates** section on Jira administration displayed on the left sidebar.



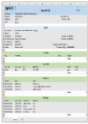
Click there and a modal should appear with **Template Store**.



Find Xporter Templates

Select type...

Sort by Rating

Preview	Template	Details
	Issue Details with Cover Page 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. ★★★★★ (28) 926 Downloads	Xpand Add-ons Jan 18, 2015 Install
	Issue Details with QR Code Single Issue A template that exports some issue fields and a QR code with a link to the URL of the issue. The QR Code is being generated with the QR Code Generator , it is possible to customize the QR Code size, quality and colors. This template has been designed to export single issues and multiple issues. ★★★★★ (16) 300 Downloads	Xpand Add-ons Jan 18, 2015 Reinstall
	Issue Detail Excel Excel Exports issue information to a excel sheet, including subtasks, linked issues and worklogs. This template only works with Xporter for JIRA 4 and above. ★★★★★ (2) 487 Downloads	Xpand Add-ons Oct 26, 2015 Reinstall

Along with user-created templates, Xporter for Jira provides a **Template Store** where you can find and install templates provided by our team.

Choose one that you suits yours needs, 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**.

Exercises

Exporting a Single Issue

In order to export your first document, just navigate to an issue of your choosing on your Jira instance. There, click in **Open Xporter** menu and there you can select the *Template* and *Output format* of your generated document.

MOON Software project

MOON board Board

Backlog

Active sprints

Reports

Releases

Issues and filters

Pages

Components

Entity properties

Testing Board

Add item

Project settings

MOON-2

Analyse and Improve logging

Attach

Create subtask

Link issue

Link page

...


Description
We should improve our logging system.

Environment
None

Attachments

attached.docx 310 KB

attached.pdf 140 KB



Linked issues
relates to

MOON-3 Testing wf + sftp

↑

TO DO

Xporter

Template

Issue Details with Cover Page

Output Options

DOCX

Export

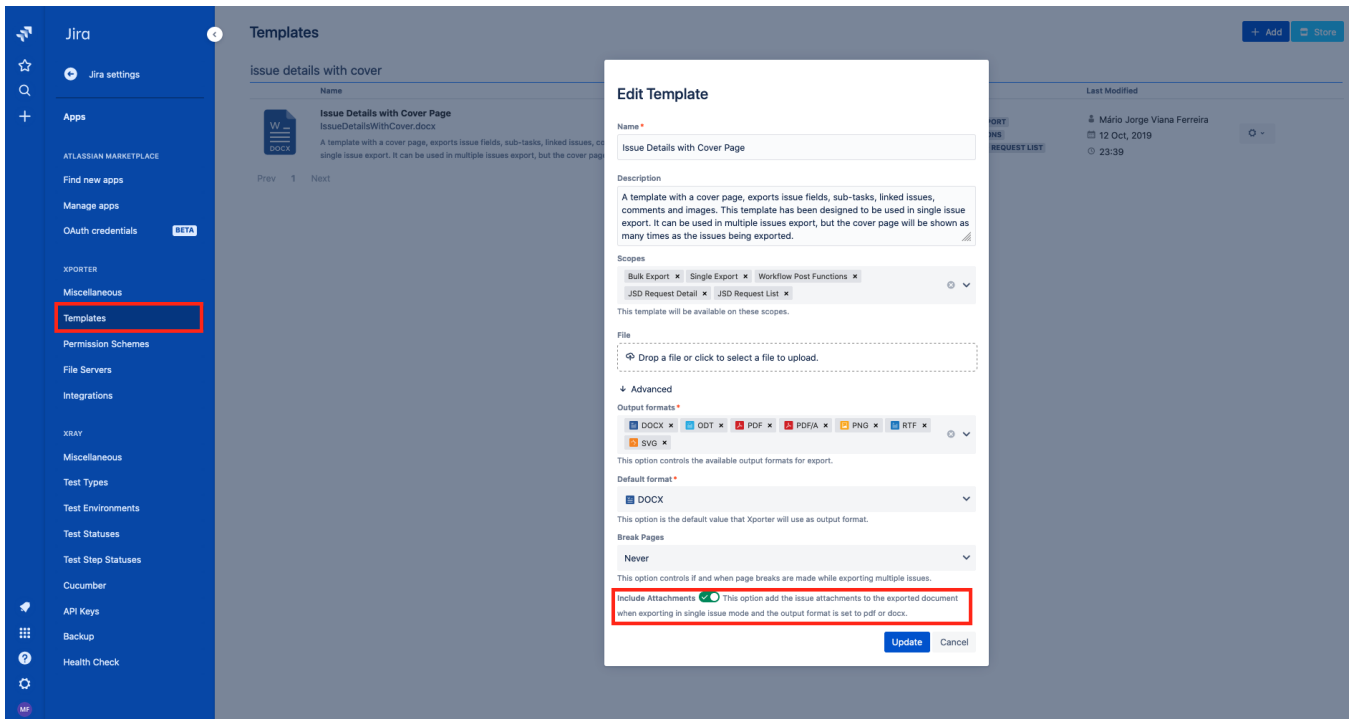
Select the **Issue Details with Cover Page** template. Since it is a **DOCX** template, the Output format available options will only display word compatible formats like **PDF** and **DOCX**.

Choose **Issue Detail Excel** instead; that will change to other formats like **PDF** and **XLSX**.

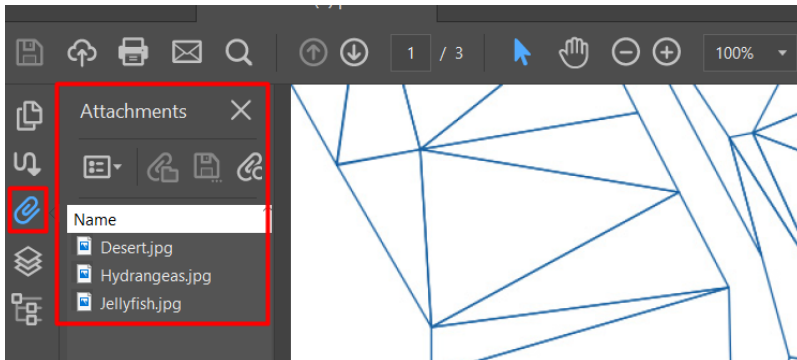
Export the issue with the options selected and will automatically download the generated document.

Exporting a Single Issue with attachments

Return to the **Templates** page on Jira Administration and edit the **Issue Details with Cover Page** template to include attachments.



Now, choose any issue of your desire and add two attachments. Select the **Issue Details with Cover Page** and the **PDF** output format 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.

Exporting a Bulk of Issues

Return to your Jira issues and filters page tab and selected *Search for Issues*.

Customize the JQL to and make sure multiple issues are displayed (but less than **10000** which is the Xporter maximum issues to be exported).

The screenshot shows the Jira interface with a search bar at the top. The search criteria is 'key > MOON-1 AND key < MOON-7 ORDER BY key'. The search results show a list of issues on the left, with 'MOON-2: Analyse and Improve logging' selected. The main view shows the issue details for 'MOON-2'. The issue is a 'Story' with a 'Medium' priority, 'None' affects versions, and 'Database, Services' components. The status is 'DONE'. The description is 'We should improve our logging system.' The 'Xporter' menu is visible in the top right corner.

Click on the **Xporter** menu on top of the search bar, select **Xporter for Jira** and you will navigate to a modal where you can choose the exporting options.

The screenshot shows the 'Export issues using Xporter' modal. The modal has a title 'Export issues using Xporter' and a description: '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.' The modal has two main sections: 'Template' and 'Output format'. The 'Template' section has a dropdown menu with 'Issue Details with Cover Page' selected. The 'Output format' section has a dropdown menu with 'PDF' selected. Below the dropdowns, there is a list of output formats: DOCX (Word), ODT (Openoffice), PDF, PDF/A, PNG, RTF, and SVG. The 'PDF' option is highlighted. The modal also has a 'Show more' link at the bottom right.

Export the **Issue Details with Cover Page** template with the *Output format* as **DOCX** and the *Break pages* selector with the **Issues** value.

The generated document will be available for 10 minutes to be downloaded. Click on **Download** to retrieve it.

After downloading, open it and you'll see that all issues are printed, each starting after a page break.

Export issues using Xporter



Success!

Export completed successfully. The file can be downloaded and



one on the stack of issues to be printed.

Break Pages

Other possible values on Break Pages option:

- **Projects:** a break occurs only when an issue belongs to a different project than the previous one on the stack of issues to be printed.
- **Issue Types:** when an issue is from a different Issue type than the previous one on the stack of issues to be printed
- **Components:** when an issue is associated with different components than the previous

Working with the Enable Xporter for all projects and all users option

Navigate to the **Miscellaneous** page on Jira Administration and on the *Enable Xporter for all projects and all users*, tick **Off** and click **Save**.

Now visit any Issue page and you'll notice the *Xporter* 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 in current Permission Scheme*.

Return to **Miscellaneous** page on Jira Administration and on the *Enable Xporter 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. 😊