(Profile) User Templates

- User Template Management
- Sharing Templates

User Template Management

The user template management screen allows you to create, edit, delete, and share your personal templates.

> ⓘ You can access this page by going to your Jira user profile and clicking **Xporter Templates** on the side tab.

Each template is composed of 3 main elements:

- **Template name**: the name that is displayed to the users in order to select the template to export the issue(s) information.
- **Template 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)
  - XLSM (Excel Template with Macros)
  - ODT (Open Office Document)
  - RTF (Rich Text Format)
  - TXT (Text File)

For audit purposes, this screen also displays the user and the date the template was last modified.

The operations available on this screen are:

- **Add New Template**: Allows you to add a new template.
- **Edit Template**: Allows you to change an existing template, changing the template name, template description, and template file.
- **Delete Template**: Deletes an existing template.
- **Download Template**: Downloads the template file. This operation is available in the hyperlink with the template file name.
- **Share Template**. Lets you share your personal template with a specific user or a group within Jira.

Sharing Templates

When uploading your template to the User Template Management zone, you can share your newly made template with any user or group that exists in that Jira. This functionality is not possible in the Administrator area.

Click the **Share** label that exists in each template.

Jira Admin

⚙ Tools ⌄

Summary
Xporter Templates

Xporter Templates

Q Search...

+ Add

Show 10 entries

Details		Active Scopes	Last Modified	Operations
Xporter Demo 1 XrayTestExecBasicWithCoverPage.docx Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus sollicitudin eu leo sit amet dignissim. Sed id tincidunt tortor, at porttitor justo... Show more		AGILE BOARDS BULK EXPORT JSD REQUEST DETAIL Show more	Jira Admin (admin) 2020-05-12 11:27	⚙ ⌄
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Xporter Demo 3 xporterReports.docx Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus sollicitudin eu leo sit amet dignissim. Sed id tincidunt tortor, at porttitor justo... Show more	SHARED	AGILE BOARDS JSD QUEUES XPORTER REPORTS	Jira Admin 2020-05-0 17:01	⚙ ⌄ Download Edit Share Delete

Previous 1 Next

You will now see a pop-up window that presents two inputs, one for sharing with individual Jira users and another one to share with Jira groups.

Template Sharing

Share with user:

Share with group:

Share   Cancel

When you click one of these two buttons, a new window will appear where you can select all the Jira users/groups that you want.

Jira   Dashboards ⌄   Projects ⌄   Issues ⌄   Boards ⌄   Create   Search   🔍

User Picker

Full Name Contains

Email Contains

In group
Any

Users Per Page
20

Filter

Displaying users **1** to **9** of **9**.

	Username	Full name	Email
☐	admin	Jira Admin	rui.rodrigues@xpand-it.com
☐	agrant-sd-demo	Alana Grant	agrant-sd-demo@example.com
☑	dev	Developer Rui	rodrigues.rmb@gmail.com
☐	jevans-sd-demo	Jennifer Evans	jevans-sd-demo@example.com
☐	mdavis-sd-demo	Mitch Davis	mdavis-sd-demo@example.com
☑	psmith	Peter Smith	peter@pm.com
☐	rlee-sd-demo	Ryan Lee	rlee-sd-demo@example.com
☑	rmb	Project Manager	rmbr@xpand-it.com
☐	vwong-sd-demo	Vincent Wong	vwong-sd-demo@example.com

Select

Once done, click **Select** and the end result will be something like this:

Template Sharing

Share with user:

admin, user

Share with group:

jira-administrators

Share   Cancel