

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.



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**.

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Add Parameters To Function

Add required parameters to the Function.

Template:

Issue Details Excel

Choose the template that will be used in the post function

Output format:

PDF

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:

☐ On ☒ 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:

☐ On ☒ Off

Choose where you want to save your document, locally or on a remote server

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.

The Exercise(s)

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.

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Add Parameters To Function

Add required parameters to the Function.

Template:

Issue Details Excel

Choose the template that will be used in the post function

Output format:

PDF

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:

☐ On

☒ 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:

document_\$Key_\$Status.pdf

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

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.

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Add Parameters To Function

Add required parameters to the Function.

Template:

Issue Details Excel

Choose the template that will be used in the post function

Output format:

PDF

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:

☐ On

☒ 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:

☐ On

☒ Off

Choose where you want to save your document, locally or on a remote server

Add

Cancel



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 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**.

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You are editing a draft workflow. **Publish Draft** Discard Draft View original

Workflows

Copy of Software Simplified Workflow for Project PROJ **DRAFT** SHARED BY 1 PROJECT

Generated by JIRA Software version 7.3.0-DAILY20161214023053. This workflow is managed internally by JIRA Software. Do not manually modify this workflow. (This copy was automatically generated from a draft, when workflow 'Software Simplified Workflow for Project PROJ' was made inactive.)

This draft was last edited by you at 21/Feb/17 1:52 PM.

Diagram Text Export

Step Name (id)	Linked Status	Transitions (id)	Actions
To Do (1)	TO DO	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit View Properties
In Progress (6)	IN PROGRESS	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit View Properties
Done (11)	DONE	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit View Properties

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

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).



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.

Administration

Applications Projects Issues Add-ons User management System

Add Parameters To Function

Add required parameters to the Function.

Template:

Choose the template that will be used in the post function

Output format:

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: ☐ On ☒ Off

Choose if the file that will be attached will have the same file name defined below

Attachment file name:

Provide the name for the file that will be attached to issue.

Filename:

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

File Server:

Choose the server that will be used in the post function.

Add

Cancel

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**.

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You are editing a draft workflow

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Workflows

Copy of Software Simplified Workflow for Project PROJ 🔗 DRAFT SHARED BY 1 PROJECT

Generated by JIRA Software version 7.3.0-DAILY20161214023053. This workflow is managed internally by JIRA Software. Do not manually modify this workflow. (This copy was automatically generated from a draft, when workflow 'Software Simplified Workflow for Project PROJ' was made inactive.)

This draft was last edited by you at 21/Feb/17 1:52 PM.

Diagram

Text

Export

Step Name (id)	Linked Status	Transitions (id)	Actions
To Do (1)	TO DO	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit View Properties
In Progress (6)	IN PROGRESS	To Do (11) >> To Do In Progress (21) >> In Progress Done (31) >> Done	Add transition Edit View Properties
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.

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Add Post Function To Transition

Name	Description
<input type="radio"/> Assign to Current User	Assigns the issue to the current user if the current user has the 'Assignable User' permission.
<input type="radio"/> Assign to Lead Developer	Assigns the issue to the project/component lead developer
<input type="radio"/> Assign to Reporter	Assigns the issue to the reporter
<input type="radio"/> Create Perforce Job Function	Creates a Perforce Job (if required) after completing the workflow transition.
<input type="radio"/> Fire Event	Fires an event that can be processed by listeners.
<input type="radio"/> Generate Change History	Updates change history for an issue and stores the issue to the database.
<input type="radio"/> Notify HipChat	Send a notification to one or more HipChat rooms.
<input type="radio"/> Trigger a Webhook	If this post-function is executed, JIRA will post the issue content in JSON format to the URL specified.
<input type="radio"/> Update Issue Field	Updates a simple issue field to a given value.
<input type="radio"/> Update Issue Status	Sets issue status to the linked status of the destination workflow step.
<input type="radio"/> Xporter for JIRA Create Document Post Function	Create a document based on the issue fields.
<input checked="" type="radio"/> 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)**.

i You can use emails, mappings, Usernames or User Ids on the **Attachment file name, To, Subject, Cc, Bcc and Body fields**.

The mappings you include are [the same mappings that are used inside the templates](#) with the same notation.

You can also use the following Xporter for Jira format functions:

- [Fields with HTML](#)
- [Formatting Date Fields](#)
- [Formatting Number Field](#)
- [Formatting User Picker Fields](#)
- [Escaping fields](#)

Administration Search JIRA admin

Applications Projects Issues Add-ons User management System

Add Parameters To Function

Add required parameters to the Function.

Template: Issue List Excel

Choose the template that will be used in the post function

Output format: PDF

Choose the output format for the file that will be generated in the post function

Use default file name: ☐ On ☒ Off

Choose if the file that will be attached to email will have a custom name

Attachment file name: *

Provide the name for the file that will be attached to email.

To: *

Please separate each elements by a comma. The elements can be emails, mappings, Usernames or User Ids.

Subject:

Cc:

Please separate each elements by a comma. The elements can be emails, mappings, Usernames or User Ids.

Bcc:

Please separate each elements by a comma. The elements can be emails, mappings, Usernames or User Ids.

Body: *

The body of the email message. You may include HTML, and/or issue mappings.

Add Cancel

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 😊



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. 😊