

Cloud Creating Reports with Document Generator

1

What is the Document Generator?

Xray Document Generator is a feature that allows you to customize your own templates and generate documents regarding your Jira data, mainly, **Xray issues**, **requirements**, and **defects**. It's easy to set up and start creating your documents.

2

How can you use the Document Generator?

- Create a hard copy of the test-related issues (especially relevant for regulated industries)
- Prepare a presentation for the board with the latest status of your tests exported directly from Xray.
- Store your release coverage and status before launch with a quick report with Document Generator
- Share information with someone without Jira access, for example, relevant stakeholders
- Export agile boards with requirement status and coverage.
- Customize your report templates and embed your brand into all your exports.

3

Exporting Reports

You can create documents directly from the Issue detail screen by clicking on the Xray Document Generator button available on Actions section (1) or from Issue Navigator screen (2).

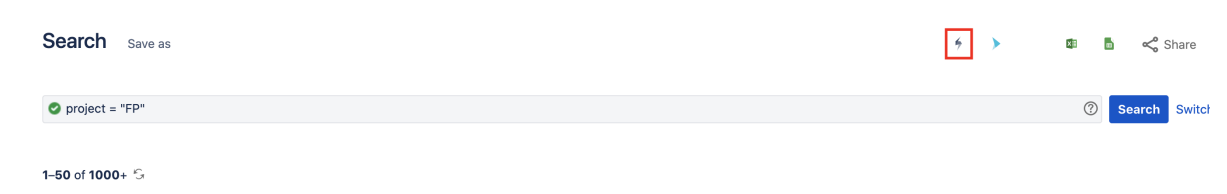
Issue Detail Screen (1)

The screenshot shows the Jira Issue Detail Screen for an issue titled "As a user, I should be able to export issues". The issue is in the "To Do" state and is assigned to "Unassigned". The "Reporter" is "Rafael Videira Morais". The "Labels" are "None". The "Begin Date" is "None". The "Custom Version" is "None". The "Custom Group" is "None". The "Custom String" is "None". The "Custom OptionChild" is "None". The "Approvers" are "None". The "Multi Version" is "None". The "Multi Choice" is "None".

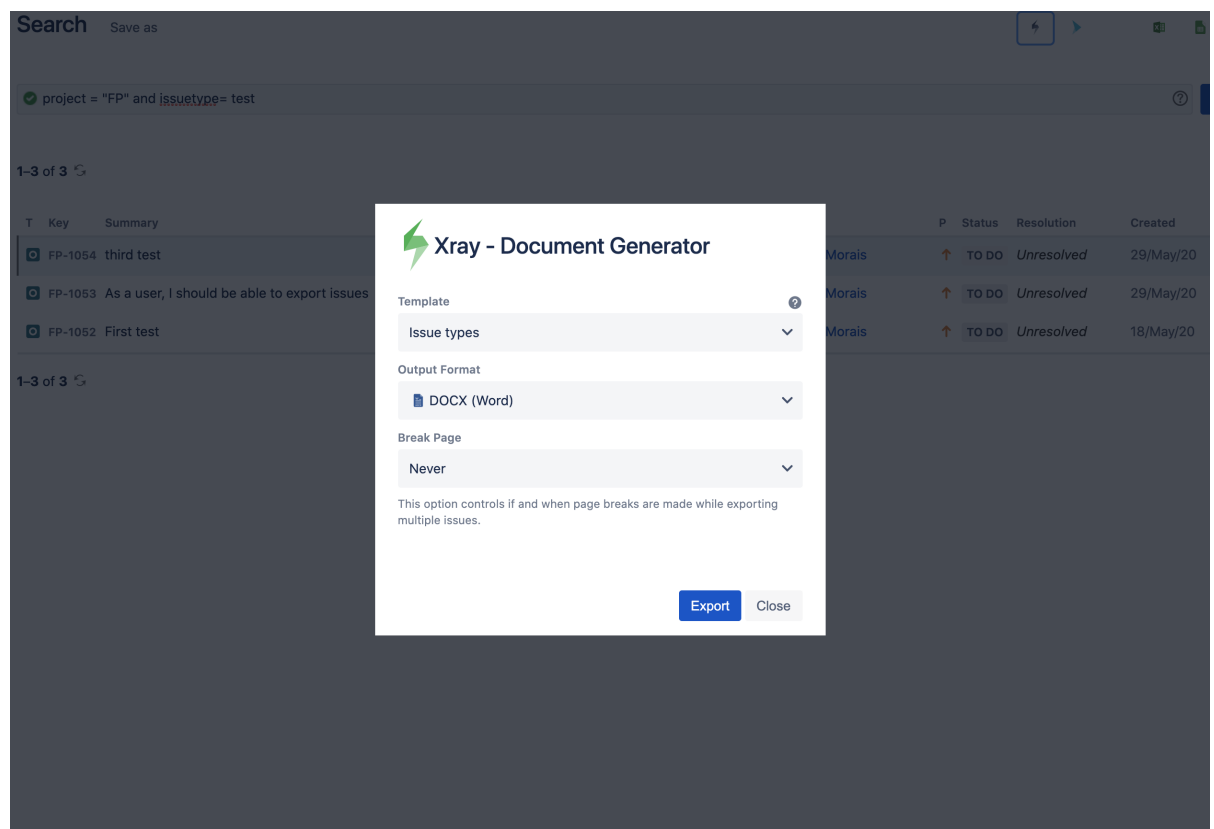
The "To Do" dropdown menu is open, showing the following options:

- Log work
- Add flag
- Xporter
- Xporter - Dev
- Xray - Export to Cucur
- Xray - Document Generator**
- Convert to Subtask
- Move
- Clone
- Delete
- Print
- Export XML
- Export Word
- NEW JIRA ISSUE VIEW
- Show me the highlight
- Find out more
- Turn off for now
- See the old view
- Configure

Issue Navigator Screen (2)



After clicking on it, you can select the template to use and the output format.



Having chosen the template and the output format, now you can generate your document by clicking on **Export** button, otherwise, we can close the dialog by clicking on **Close** button.

Once the generation process is finished you can get your document by clicking on **Download** button.

Search

Save as

project = "FP" and issuetype= test

1-3 of 3

T	Key	Summary	P	Status	Resolution	Created
	FP-1054	third test	Morais	↑ TO DO	Unresolved	29/M
	FP-1053	As a user, I should be able to export issues	Morais	↑ TO DO	Unresolved	29/M
	FP-1052	First test	Morais	↑ TO DO	Unresolved	18/M

1-3 of 3

Xray - Document Generator

✓

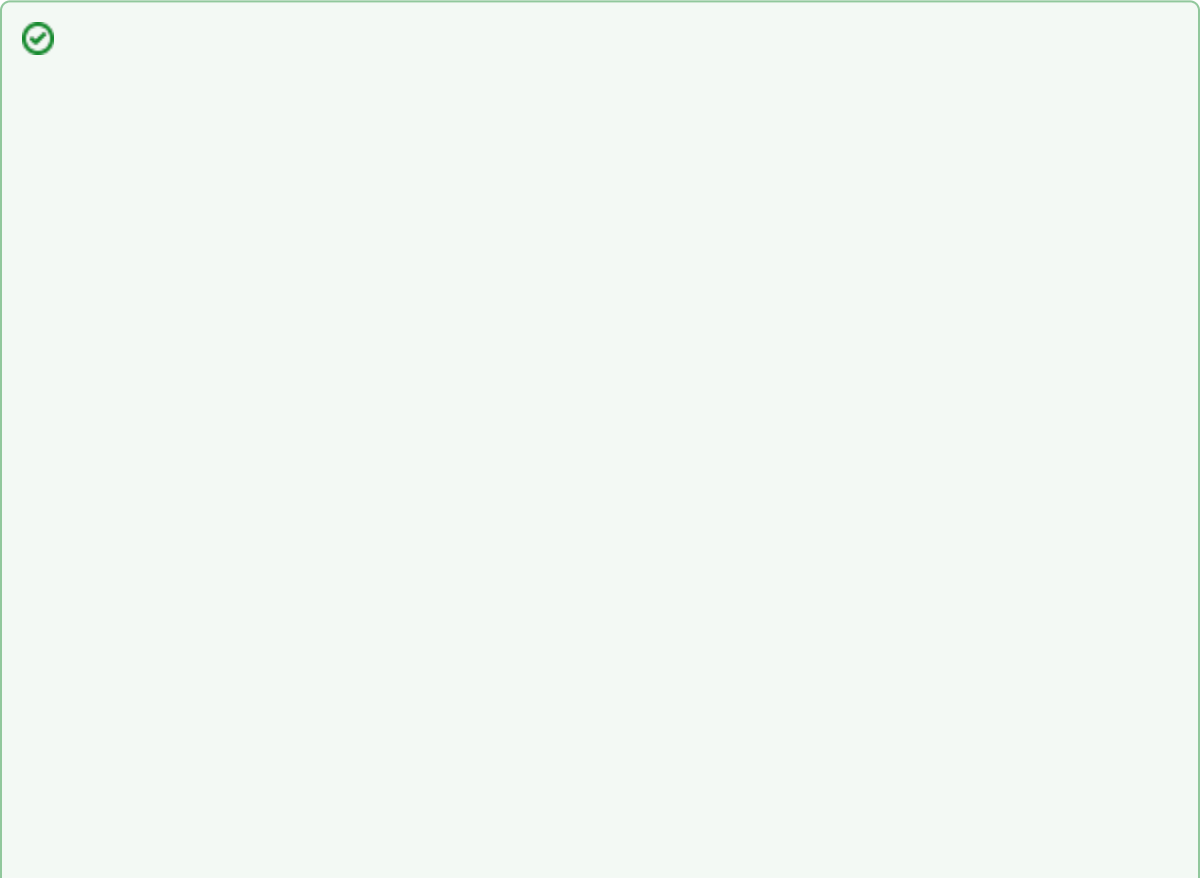
Export completed successfully

The file can be downloaded and will be available for 09:46.

Download

Back

Close



Xray Document generator is available on the Agile Boards/Releases and you will be able to export all the issues allowed by Xray that belong to the Active Sprint, Backlog or Releases.

From Active Sprint

Projects / First Project / FP board

FP Sprint 1

☆ 7 days remaining

RM

Only My Issues

Recently Updated

TO DO

As a user, I can export issues

FP-1

As a user, I can see issues

FP-1035

Impossible to get data from JQL

FP-2

IN PROGRESS

Export data from JQL

FP-1037

As admin, I can see all the users

FP-1036

DONE

As an app, I should be able to delete a

From Backlog

First Project

Classic software project

FP board

Backlog

Active sprints

Reports

Releases

Issues and filters

Pages

Components

Testing Board

Entity properties

Add item

Project settings

Projects / First Project / FP board

Backlog

RM

Only My Issues

Recently Updated

VERSIONS

FP Sprint 1

6 Issues

22/Jun/20 3:57 PM • 06/Jul/20 3:57 PM

EPICS

As a user, I can export issues

As a user, I can see issues

Impossible to get data from JQL

Export data from JQL

As admin, I can see all the users

As an app, I should be able to delete a project

Backlog

1,046 issues

As a user, I should be able to define the issues to export

As admin, I should be able to control the exportation

From Releases

First Project

Classic software project

FP board

Backlog

Active sprints

Reports

Releases

Issues and filters

Pages

Components

Testing Board

Entity properties

Add item

Project settings

Projects / First Project / Releases

Version V 1.012.11

UNRELEASED

Start: 24/Jun/20 Release: 26/Jun/20 Release Notes

1 day left

4

Issues in version

0

Issues done

1

Issues in progress

3

Issues to do

1-4 of 4

P

T

Key

Summary

Assign

FP-1035

As a user, I can see issues

FP-1037

Export data from JQL

FP-1

As a user, I can export issues

FP-2

Impossible to get data from JQL

4

Creating your own templates

Templates are documents in DOCX (Microsoft Word) or XLSX (Microsoft Excel) formats. Along with the document content, it is possible to specify mappings that will be replaced by the issue fields, custom fields, and other data such as comments, work logs, attachments, and many other types of data.

Check documentation for template building and template management:

- [Template Building](#)
- [Template Management](#)



Check out our documentation to learn more about the [Document Generator](#).