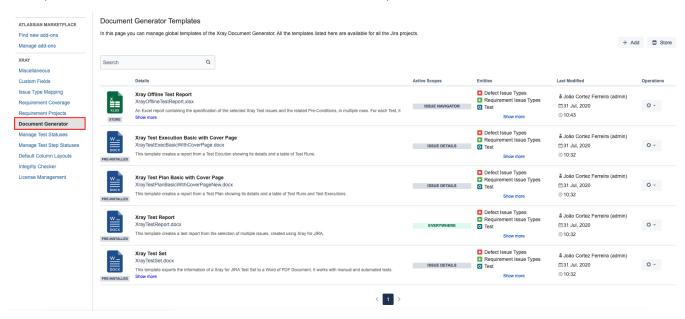
Template Management

- Managing Templates
- Template Details
- Template Scopes
- Template Entities
- Template Store
- Managing Templates at Project Settings
 - O Disable the document generator at the project level

The templates screen allows administrators to add, edit, delete and download the templates that will be available to the users.

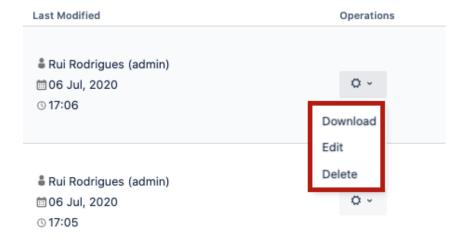


Managing Templates

The operations available on this screen are:

- Add New Template: Allows you to create a new template.
- Store: With this option, you'll be able to install templates from the Template Store in this screen.
- Download Template: Allows you to download the template file. This operation is available in the hyperlink with the template file name.
- Edit Template: Allows you to change an existing template, changing the template name, template
 description and template file.
- Delete Template: Allows you to delete an existing template.





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: where the template will be available.
- Entities: a group of issues or issue types that are available as Xray Entities.
- Output formats: list of available template formats for a given input format. For more information go to Outputs Matrix Page.
- Default output format: one of the output formats allowed to be displayed as default.
- · Default break page type: handles how Xray Document Generator should break pages. The following break pages are supported:
 - Never
 - o Issues
 - o Components
 - Issue Types
 - Projects
- File: the file with 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)

Template Scopes

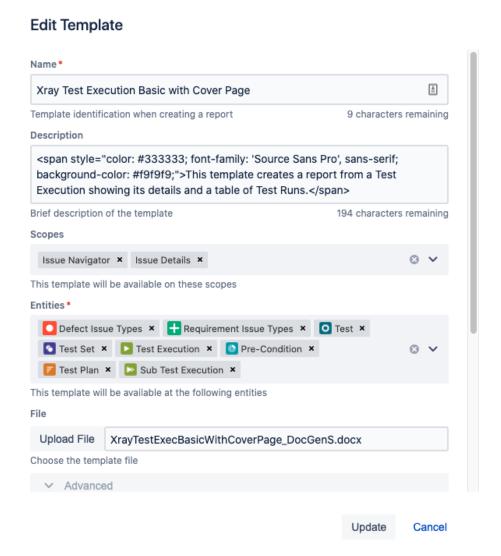
Template scopes define where the template will be available. The following scopes are available:

Scope	Location
Issue Navigator	Issue Navigator screen

Issue Details	Issue details screen
Agile Boards	This scope refers to Backlog and Active Sprint and Kanban board
Agile Releases	Manage Release on Agile/Kanban boards. Document Generator is available on the Release list and detail screen.
Test Plan Board	Test Plan Board screen
Test Repository	Test Repository screen

Template Entities

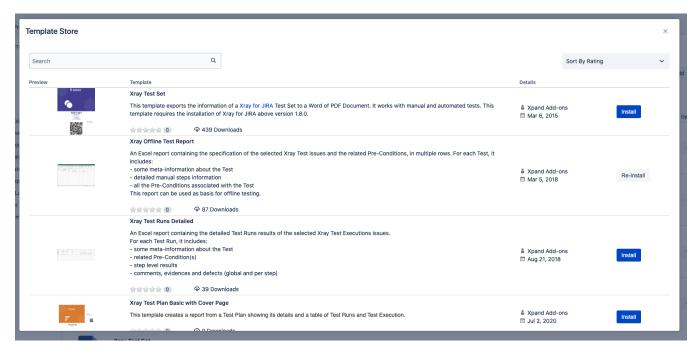
Template Entities define the issue types or group of issues (Coverables or Defects) that are considered as Xray entities and are available to be exported.



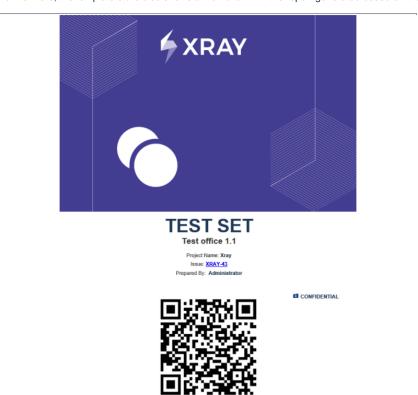
Template Store

Document Generator provides another way to get awesome templates. Use the Template Store to access and install templates provided by us, free of charge.

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

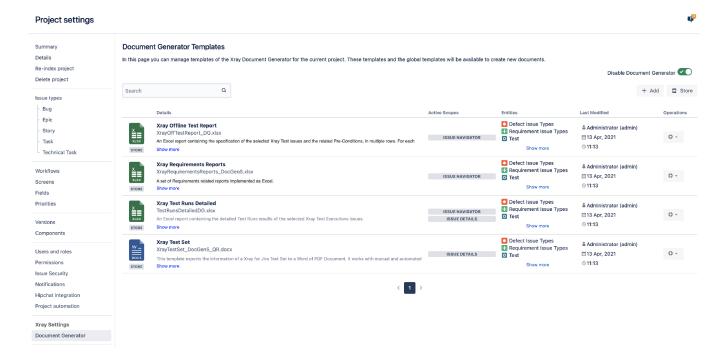


Furthermore, the template store also shows a thumbnail with the report generated based on the template selected.



Managing Templates at Project Settings

All features related to Templates management on App Administration are included at Project level.



Disable the document generator at the project level

On this page, it is now possible for the administrator to disable the document generator at the project level.

