

# Template Management

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

ATLASSIAN MARKETPLACE

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Manage add-ons

XRAY

Miscellaneous

Custom Fields

Issue Type Mapping

Requirement Coverage

Requirement Projects

Document Generator

Manage Test Statuses

Manage Test Step Statuses

Default Column Layouts

Integrity Checker

License Management

Document Generator Templates






In this page you can manage global templates of the Xray Document Generator. All the templates listed here are available for all the Jira projects.

+ Add

Store

Search

Q

Details	Active Scopes	Entities	Last Modified	Operations
<div><div></div><div><b>Xray Offline Test Report</b> XrayOfflineTestReport.xlsx An Excel report containing the specification of the selected Xray Test issues and the related Pre-Conditions, in multiple rows. For each Test, it <a href="#">Show more</a></div></div>	<div>ISSUE NAVIGATOR</div>	<div><div>Defect Issue Types</div><div>Requirement Issue Types</div><div>Test</div><div><a href="#">Show more</a></div></div>	<div>João Cortez Ferreira (admin)</div> <div>31 Jul, 2020</div> <div>10:43</div>	<div></div>
<div><div></div><div><b>Xray Test Execution Basic with Cover Page</b> XrayTestExecBasicWithCoverPage.docx This template creates a report from a Test Execution showing its details and a table of Test Runs.</div></div>	<div>ISSUE DETAILS</div>	<div><div>Defect Issue Types</div><div>Requirement Issue Types</div><div>Test</div><div><a href="#">Show more</a></div></div>	<div>João Cortez Ferreira (admin)</div> <div>31 Jul, 2020</div> <div>10:32</div>	<div></div>
<div><div></div><div><b>Xray Test Plan Basic with Cover Page</b> XrayTestPlanBasicWithCoverPageNew.docx This template creates a report from a Test Plan showing its details and a table of Test Runs and Test Executions.</div></div>	<div>ISSUE DETAILS</div>	<div><div>Defect Issue Types</div><div>Requirement Issue Types</div><div>Test</div><div><a href="#">Show more</a></div></div>	<div>João Cortez Ferreira (admin)</div> <div>31 Jul, 2020</div> <div>10:32</div>	<div></div>
<div><div></div><div><b>Xray Test Report</b> XrayTestReport.docx This template creates a test report from the selection of multiple issues, created using Xray for JIRA.</div></div>	<div>EVERYWHERE</div>	<div><div>Defect Issue Types</div><div>Requirement Issue Types</div><div>Test</div><div><a href="#">Show more</a></div></div>	<div>João Cortez Ferreira (admin)</div> <div>31 Jul, 2020</div> <div>10:32</div>	<div></div>
<div><div></div><div><b>Xray Test Set</b> XrayTestSet.docx This template exports the information of a Xray for JIRA Test Set to a Word or PDF Document. It works with manual and automated tests. <a href="#">Show more</a></div></div>	<div>ISSUE DETAILS</div>	<div><div>Defect Issue Types</div><div>Requirement Issue Types</div><div>Test</div><div><a href="#">Show more</a></div></div>	<div>João Cortez Ferreira (admin)</div> <div>31 Jul, 2020</div> <div>10:32</div>	<div></div>

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## 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.

+ Add     Store

Last Modified	Operations
 Rui Rodrigues (admin)  06 Jul, 2020  17:06	 ▾ <div><div>Download</div><div>Edit</div><div>Delete</div></div>  ▾
 Rui Rodrigues (admin)  06 Jul, 2020  17:05	

## 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
  - Issues
  - 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.

### Edit Template

Name \*

Xray Test Execution Basic with Cover Page



Template identification when creating a report

9 characters remaining

Description

<span style="color: #333333; font-family: 'Source Sans Pro', sans-serif; background-color: #f9f9f9;">This template creates a report from a Test Execution showing its details and a table of Test Runs.</span>

Brief description of the template

194 characters remaining

Scopes

Issue Navigator x Issue Details x



This template will be available on these scopes

Entities \*

Defect Issue Types x Requirement Issue Types x Test x  
Test Set x Test Execution x Pre-Condition x  
Test Plan x Sub Test Execution x



This template will be available at the following entities

File

Upload File XrayTestExecBasicWithCoverPage\_DocGenS.docx

Choose the template file

Advanced

Update

Cancel

## 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.

Template Store

Search

Sort By Rating

Preview	Template	Details
	<b>Xray Test Set</b> This template exports the information of a <a href="#">Xray for JIRA</a> Test Set to a Word or PDF Document. It works with manual and automated tests. This template requires the installation of Xray for JIRA above version 1.8.0. ★★★★★ (0) 439 Downloads	Xpand Add-ons Mar 6, 2015 Install
	<b>Xray Offline Test Report</b> An Excel report containing the specification of the selected Xray Test issues and the related Pre-Conditions, in multiple rows. For each Test, it includes: - some meta-information about the Test - detailed manual steps information - all the Pre-Conditions associated with the Test This report can be used as basis for offline testing. ★★★★★ (0) 87 Downloads	Xpand Add-ons Mar 5, 2018 Re-Install
	<b>Xray Test Runs Detailed</b> An Excel report containing the detailed Test Runs results of the selected Xray Test Executions issues. For each Test Run, it includes: - some meta-information about the Test - related Pre-Condition(s) - step level results - comments, evidences and defects (global and per step) ★★★★★ (0) 39 Downloads	Xpand Add-ons Aug 21, 2018 Install
	<b>Xray Test Plan Basic with Cover Page</b> This template creates a report from a Test Plan showing its details and a table of Test Runs and Test Execution. ★★★★★ (0) 0 Downloads	Xpand Add-ons Jul 2, 2020 Install

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.

## Project settings



Summary  
Details  
Re-index project  
Delete project

Issue types  
Bug  
Epic  
Story  
Task  
Technical Task

Workflows  
Screens  
Fields

Priorities

Versions  
Components

Users and roles  
Permissions  
Issue Security  
Notifications  
Hipchat integration  
Project automation

Xray Settings  
Document Generator

























### Document Generator Templates

In this page you can manage templates of the Xray Document Generator for the current project. These templates and the global templates will be available to create new documents.

Disable Document Generator ☒

Search

+ Add

Details	Active Scopes	Entities	Last Modified	Operations
 <b>Xray Offline Test Report</b> XrayOfflineTestReport_DG.xlsx An Excel report containing the specification of the selected Xray Test issues and the related Pre-Conditions, in multiple rows. For each <a href="#">Show more</a>	<a href="#">ISSUE NAVIGATOR</a>	 Defect Issue Types  Requirement Issue Types  Test <a href="#">Show more</a>	 Administrator (admin) 13 Apr, 2021 11:13	
 <b>Xray Requirements Reports</b> XrayRequirementsReports_DocGenS.xlsx A set of Requirements related reports implemented as Excel. <a href="#">Show more</a>	<a href="#">ISSUE NAVIGATOR</a>	 Defect Issue Types  Requirement Issue Types  Test <a href="#">Show more</a>	 Administrator (admin) 13 Apr, 2021 11:13	
 <b>Xray Test Runs Detailed</b> TestRunsDetailedDG.xlsx An Excel report containing the detailed Test Runs results of the selected Xray Test Executions issues. <a href="#">Show more</a>	<a href="#">ISSUE NAVIGATOR</a> <a href="#">ISSUE DETAILS</a>	 Defect Issue Types  Requirement Issue Types  Test <a href="#">Show more</a>	 Administrator (admin) 13 Apr, 2021 11:13	
 <b>Xray Test Set</b> XrayTestSet_DocGenS_QR.docx This template exports the information of a Xray for Jira Test Set to a Word or PDF Document. It works with manual and automated <a href="#">Show more</a>	<a href="#">ISSUE DETAILS</a>	 Defect Issue Types  Requirement Issue Types  Test <a href="#">Show more</a>	 Administrator (admin) 13 Apr, 2021 11:13	

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## 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.

### Document Generator Templates

In this page you can manage templates of the Xray Document Generator for the current project. These templates and the global templates will be available to create new documents.

Disable Document Generator ☒

Search

+ Add