

Implementing (Free) Templates in JIRA

I've been working on Templating in JIRA, **without spending (a lot) of money** on a plugin for the 2000 user JIRA that I manage at work.

The first solution was making a TEMPLATE Project and use [Clone Plus](#) for cloning Issues to the real projects, but the main problem is that issues in the TEMPLATE project does not have the specific [Custom Fields](#) and [Field Configurations](#) for the real project, so tempates can be fully filled to a satisfying level before cloning the template issue to a real issue.

So, in the second attempt, I have created a lot of objects that works "in parallel" of the real issues, in this case ITIL processes.



The solution below works with the standard Clone function in JIRA, but is more flexible with the [Clone Plus](#) Plugin, which is not so expensive.

Especially, check out the possibilities in <https://bobswift.atlassian.net/wiki/display/JCPP/clone-plus.properties>

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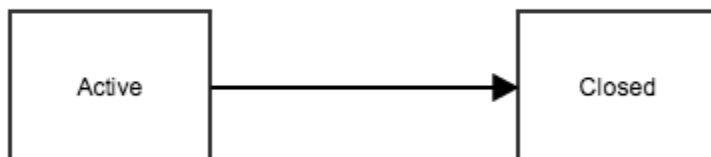
Template Issue Types

New Template Issue types created:

Issue Type	Template Issue Type
Incident	Incident Template
Change	Change Template
Service Request	Service Request Template

Workflow

Each Template is assigned to a very simple workflow:



The workflow has no real value, as cloning is always possible, so Its only a signal to the user and the status field can be used in filters.

Notifications

The workflow and Notifications is sending (virtually) no notifications at all, as this is pointless, so on Post functions the "Generic Event" is replaced with a new event "No Notifications" I have implemented under "Events" and "Notification Schemes"

Screens

As the template are created in real projects, all fields and field-configurations (and components) are present with the Template are created.

But, in the template we dont want some specific fields present, that are not relevant until cloning the Template to a real issue - typical **Date** and **Person-related** fields, so each Template has its own Screen Scheme and Sceen:

Issue Type	Screen
Incident	Incident Screen
Incident Template	Incident Template Screen
Change	Change Template
Change Template	Change Template Screen
Service Request	Service Request Screen
Service Request Template	Service Request Template Screen

Looking like this in JIRA:

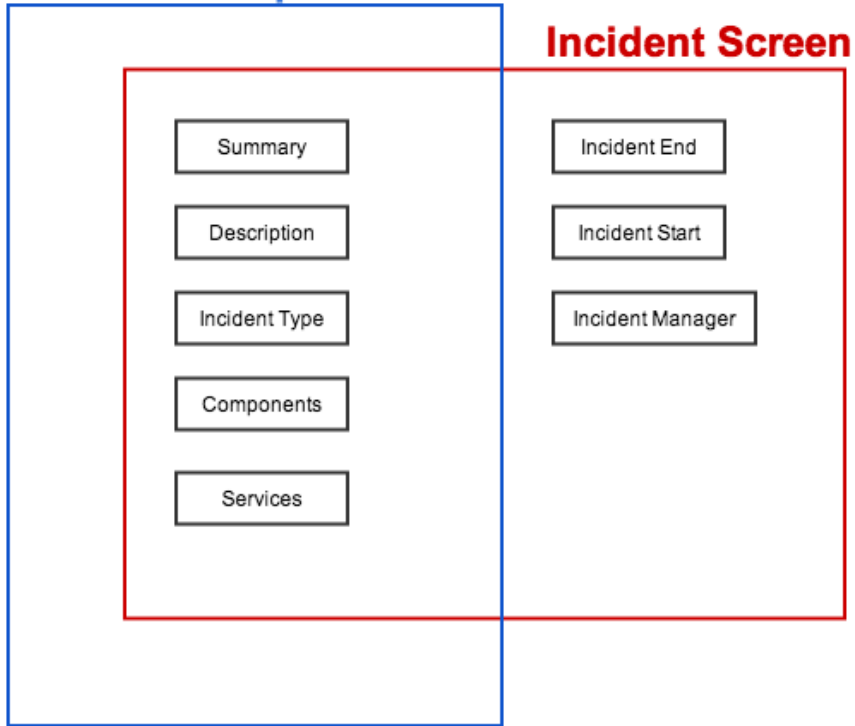
 Incident	Incident Screen Scheme
 Incident Template	Incident Template Screen Scheme

with Operation(s):

Issue Operation	Screen	Operations
<i>Default</i> Used for all unmapped operations.	Incident Template	Edit

A sample for the Incident Screens:

Incident Template Screen



A lesson learned the hard way here: Field not on the screen is not the same as the field being empty or none existing. Thus, cloning an "Incident" to an "Incident Template" will copy all fields, but they can't be seen afterwards.

Filters

In general, filters should exclude the "" Template" issuetypes.

Using Templates

I use the templates in 2 ways - cloning them from a JIRA Dashboard and referencing them from Documentation in Confluence:

JIRA Dashboard

Change Management

Repeatable Task

Incident Management

Reminders

Problem Management

Change Calenders

Overdue issues

Templates

NOC Duty

Support dashboard

Support overview

CMDB

Incident Templates

Templates

Use of Templates

Open the Template that best fits the Incident

Under "More" select "Clone++" (for cloning to another non-template Issue type)

Fill in the needed Fields (Incident Start etc) and create the Incident

All fields regarding public and systems/services are prefilled, but can be altered to the situation

Glance at <https://www.nspop.dk> to see the Incident.

Project * NSP Support

Issue Type * Incident ?

Next Cancel

Filter Results: Templates

T	Key	Summary
	NIS-4883	Opsætning af NIS-4883
	NIS-4880	Opsætning af NIS-4880
	NIS-4884	Patch Management af Ubuntu Server
	NIS-4882	Opsætning af NIS-4882
	FMK-4230	Generel test af NIS-4230
	NIS-4881	Deployment af NIS-4881
	NIS-4889	Generator og UPS Test i DC4
	NIS-4888	Generator og UPS Test i DC2
	NIS-4887	Generator og UPS Test i DC1
	NSP-4133	NSP-4133
	NSP-4145	NSP-4145
	NSP-4146	NSP-4146
	NSP-4144	NSP-4144
	NSP-4140	NSP-4140
	NSP-4143	NSP-4143
	NSP-4142	NSP-4142
	NSP-4141	NSP-4141
	NSP-4139	NSP-4139
	NSP-4138	NSP-4138

Documentation in Confluence

Here in the sample, a JIRA JQL selecting the correct "Incident Templates" are shown on the Incident Management Procedure:

Incident Management

Created and last modified by Normann P. Nielsen yesterday at 10:49

Incident Management

Incident Management

Incident Management

Incident Management

Incident Management

Incident Management

Incidents i Stage eller Test

Incidents i Stage eller Test

Incidents i Stage eller Test

JIRA Issue Macro

Templates der kan klones med Clone++

Key	Summary
NSP-4146	Incident Management
NSP-4145	Incident Management
NSP-4144	Incident Management
NSP-4143	Incident Management
NSP-4142	Incident Management
NSP-4141	Incident Management
NSP-4140	Incident Management
NSP-4139	Incident Management

Enhance Cloning for users

For JIRA, I have made a Custom Field of the Type "Message Custom Field (for view)" From the JIRA Toolkit, containing this code as "Default Value":

```

<div class="field-group aui-field-wikiedit comment-input">
<a href="" target='_self' id='templatenclose' class='aui-button aui-button-primary aui-style'>Click to Clone</a>
</div>
<script>
AJS.$(document).bind(JIRA.Events.NEW_CONTENT_ADDED, function(event, dialog) {
AJS.$('#templatenclose').attr('href','https://myserver.domain/secure/ClonePlusStart!default.jspa?id='+AJS.$('#key-val').attr('rel'));
});
</script>

```

Where the somewhat obscure code

```

AJS.$('#key-val').attr('rel')

```

Get the Issue ID in the database. Improvements here could be nice!

Rendering on the "Incident Template" Screen, the Custom Field looks like (See [Making a ADG like button](#)):

General

Operational Status

Clone This Template:

Click to Clone

Description

Click to add description

Activity

All

Comments

History

Activity

Transitions

There are no comments yet on this issue.

 Comment

Bug tracking and project tracking for

<https://jira.netic.dk/secure/ClonePlusStart!default.jspa?id=48304>