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 isssues, 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

Topics

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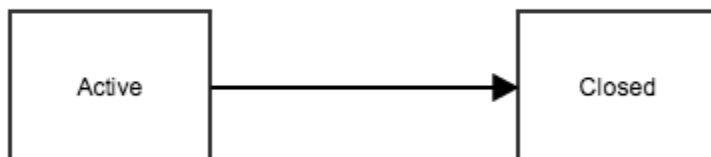
The workflow has no real value, as cloning is always possible, so Its only a signal to the user and the status field can be used in filters.

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:

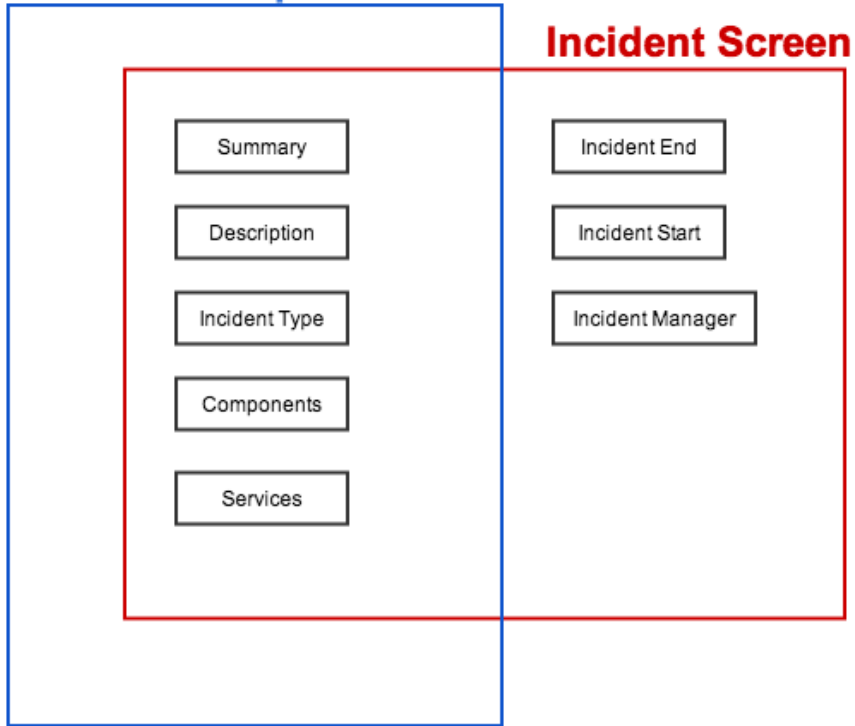| Issue Type	Screen
Incident	Incident Screen
Incident Template	Incident Template Screen
Change	Change Template
Change Template	Change Template Screen
Service Request	Service Request Screen
Service Request Template	Service Request Template Screen

Looking like this in JIRA:

I **Incident**	Incident Screen Scheme
▤ **Incident Template**	Incident Template Screen Scheme

with Operation(s):

Issue Operation	Screen	Operations
Default Used for all unmapped operations.	Incident Template	Edit

A sample for the Incident Screens:

Incident Template Screen

Incident Screen

Summary		Incident End
Description		Incident Start
Incident Type		Incident Manager
Components		
Services		

> ⊕ 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 "Inciden" t to an "Incident Template" will copy all fields, but they cant 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		**Templates**
Repeatable Task		
Incident Management		
Reminders		
Problem Management		
Change Calenders		
Overdue issues		
Templates		
NOC Duty		
Support dashboard		
Support overview		
CMDB		
Incident Templates		

Use of Templates

Open the Template that best fits the Incident

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

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*   **I** | Incident

Next   Cancel

Filter Results: Templates

T	Key	Summary
▤	NIS-4883	
▤	NIS-4880	
▤	NIS-4884	Patch Management af Ubuntu Server
▤	NIS-4882	
▤	FMK-4230	
▤	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-4145	
▤	NSP-4146	
▤	NSP-4144	
▤	NSP-4140	
▤	NSP-4143	
▤	NSP-4142	
▤	NSP-4141	
▤	NSP-4139	
▤	NSP-4138	

Documentation in Confluence

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

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='templatenclone' class='aui-button aui-button-primary aui-style'>Click to Clone</a>
</div>
<script>
AJS.$(document).bind(JIRA.Events.NEW_CONTENT_ADDED, function(event, dialog) {
AJS.$('#templateclone').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. Inprovements 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