

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 templates 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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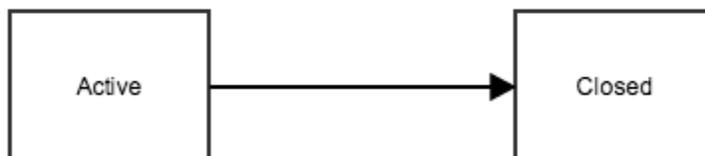
Template Issue Types

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 Scéen:

| 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:

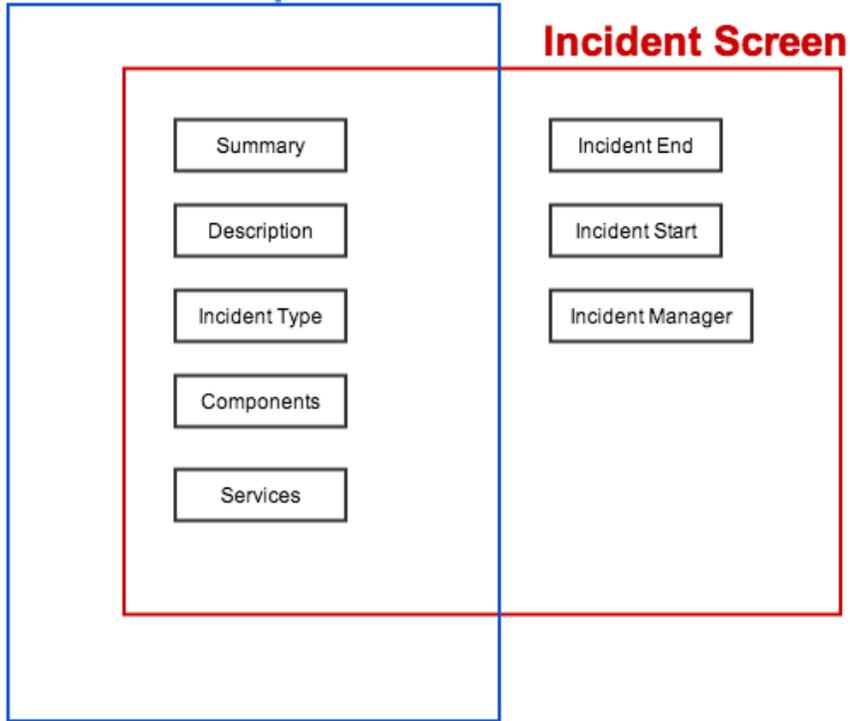
| | |
|---|---|
|  Incident | Incident Screen Scheme |
|  Incident Template | Incident Template Screen Scheme |

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

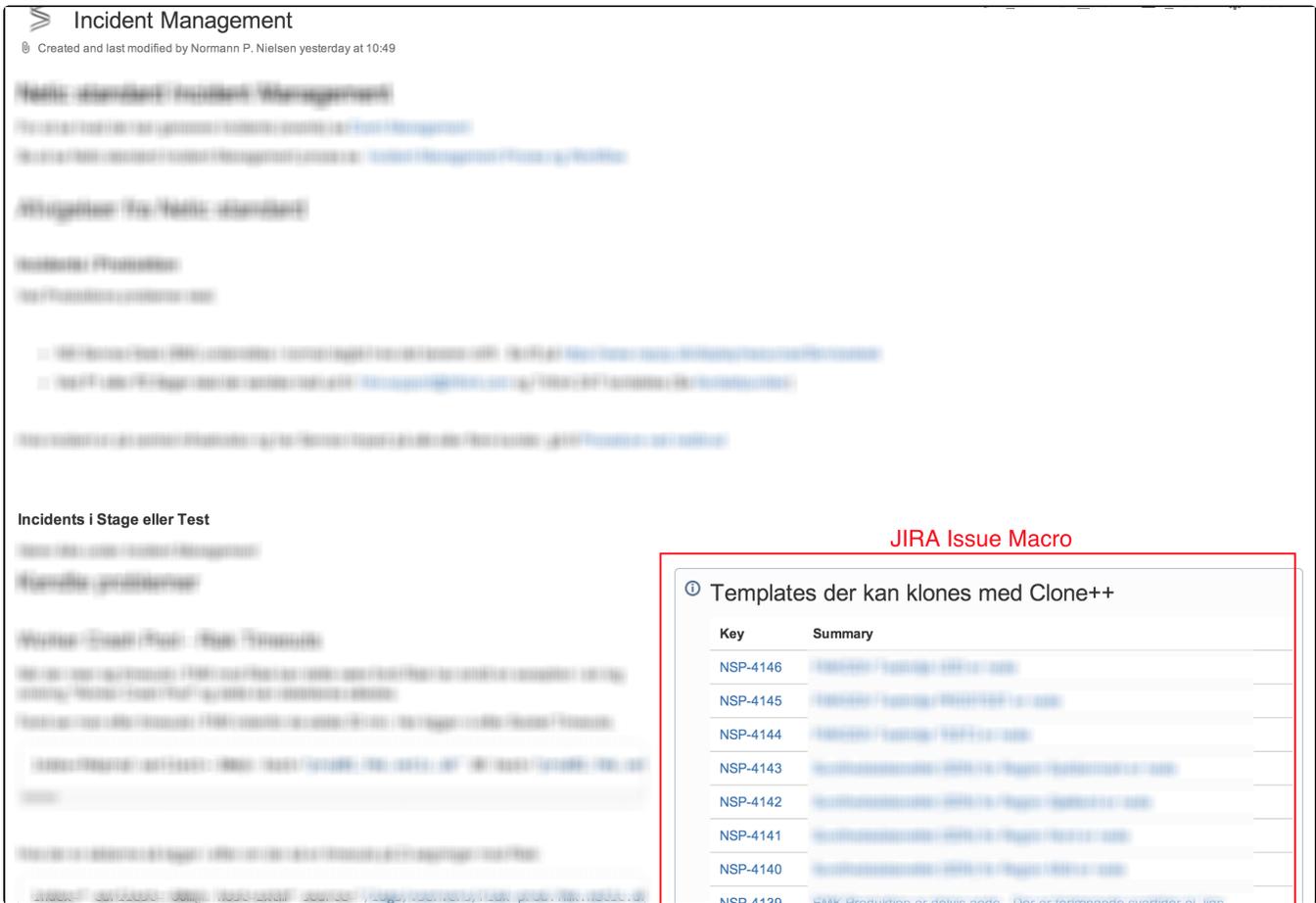
Issue Type* I Incident ?

Filter Results: Templates

| T | Key | Summary |
|---|----------|--|
| | NIS-4883 | Udgørelse af task ID #123456789 |
| | NIS-4880 | Udgørelse af task på afstand #123456789 |
| | NIS-4884 | Patch Management af Ubuntu Server |
| | NIS-4882 | Udgørelse af task på afstand #123456789 |
| | FMK-4230 | Generert task på afstand via Workar Pool / Createed |
| | NIS-4881 | Deployment af TopyRMS 9.9.9 |
| | 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 | Bundt af tasker (EIR) for Region Nordjylland er ready |
| | NSP-4145 | FMK-Produktion af task ready (EIR) er ready |
| | NSP-4146 | FMK-Produktion af task ready (EIR) er ready |
| | NSP-4144 | FMK-Produktion af task ready (EIR) er ready |
| | NSP-4140 | Bundt af tasker (EIR) for Region Midt er ready |
| | NSP-4143 | Bundt af tasker (EIR) for Region Sydjylland er ready |
| | NSP-4142 | Bundt af tasker (EIR) for Region Sjælland er ready |
| | NSP-4141 | Bundt af tasker (EIR) for Region Nord er ready |
| | NSP-4139 | FMK-Produktion af task ready (EIR) - Der er forberedte overføle af lign. |
| | NSP-4138 | FMK-Produktion af task ready (EIR) - Task og lignende |

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='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.jsps?id=48304>