

Quick Start

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Installation

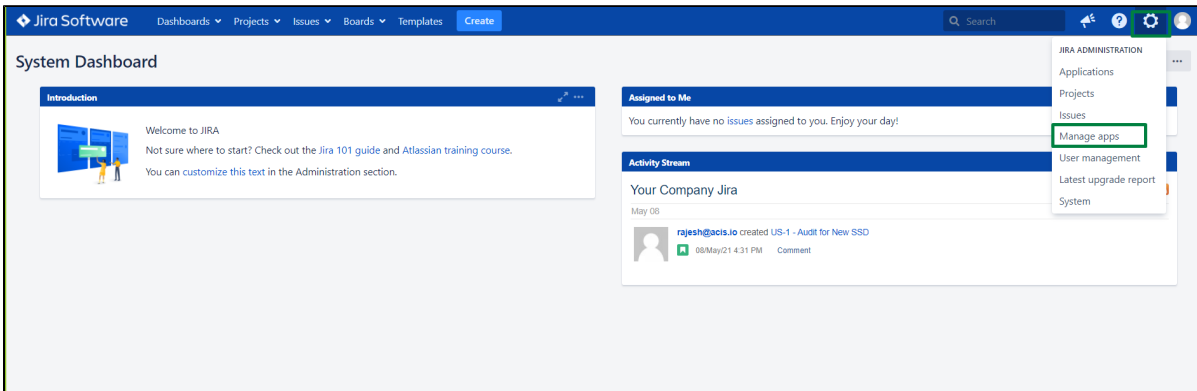
Template Manager application for JIRA, helps organizations to create templates with the context and fields they need. It provides various options to customize the templates and manage them easily. Templates are most commonly used to format the records and data properly. The Template Manager application helps to arrange all the information in specified templates and these templates can be used in various projects.

To install Template Manager, follow the steps below.

Note: This can be done only by the JIRA administrator.

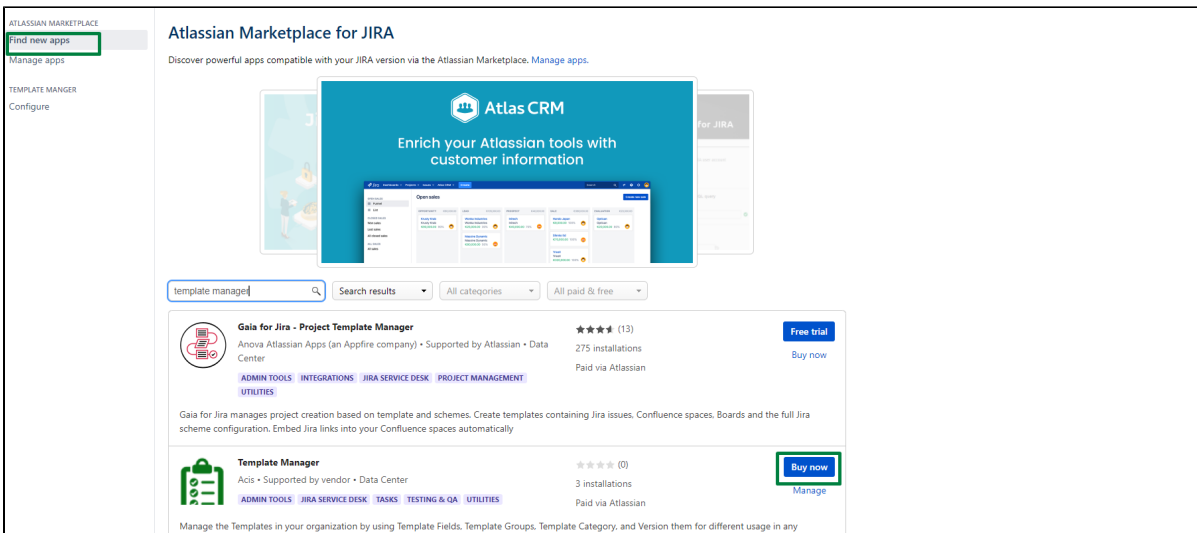
Log in as a JIRA Administrator, or as a user with JIRA administrator privileges.

Step 1: Go to Manage Apps in your Settings menu on the top right of the screen.

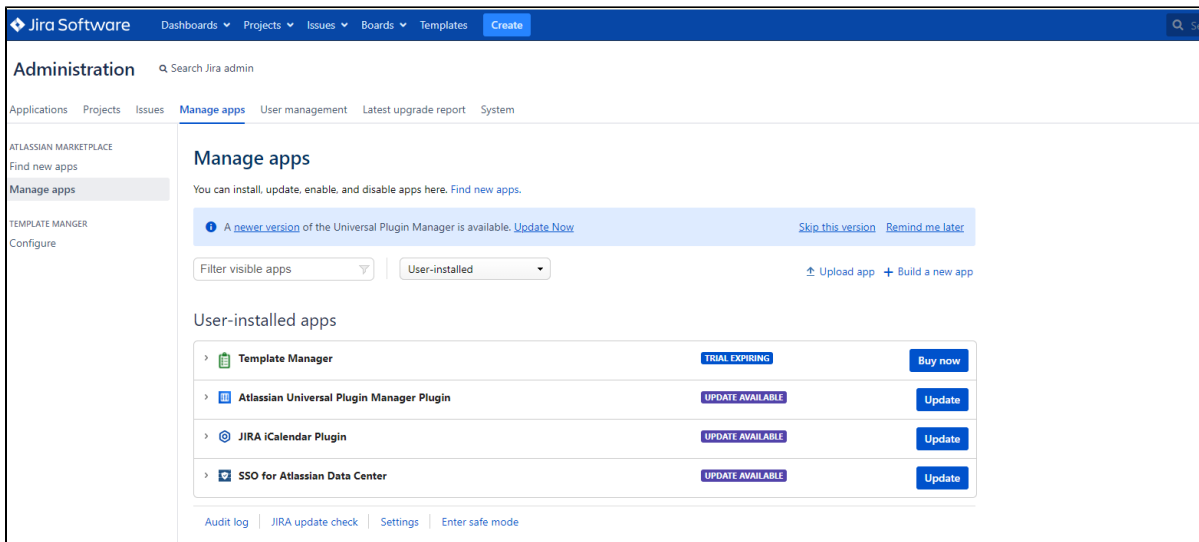


Step 2: Go to "Find new Apps" and search for Template Manager.

Step 3: Follow the prompts to **Install**, **Buy now**, or start a **Free trial**. Otherwise, you can go to the Manage apps page and click on the upload app and select the JAR File used to install the **Template Manager**.

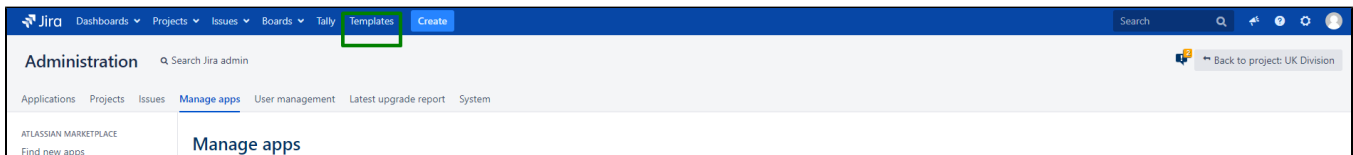


Step 4: Confirm that the app is successfully installed.



Navigating to Template Manager

After the installation of Template Manager, you need to navigate to the Template Manager App in the header section of your Jira instance to use the Template Manager App. Refer to the screenshot below for navigation.



Administrators

Administrators are the ones who are responsible for managing the Template Manager App. In Template Manager, three types of Administrators are present to manage the application. The three types of Administrators are,

1. JIRA Admin
2. Application Admin
3. Template Admin

Application Admin

Application Admin is the one who can manage and configure the templates. Application Admin has the permission to add and remove Application Admin and Template Admin. If Jira Admin allows the Application Admin to configure the project, he will configure the Projects.

Template Admin

Template Admin can manage and configure templates in the Template Manager Application and he has no permission to add and remove Application Admin and Template Admin. He cannot Configure Projects in the Template Manager.

Add Administrators

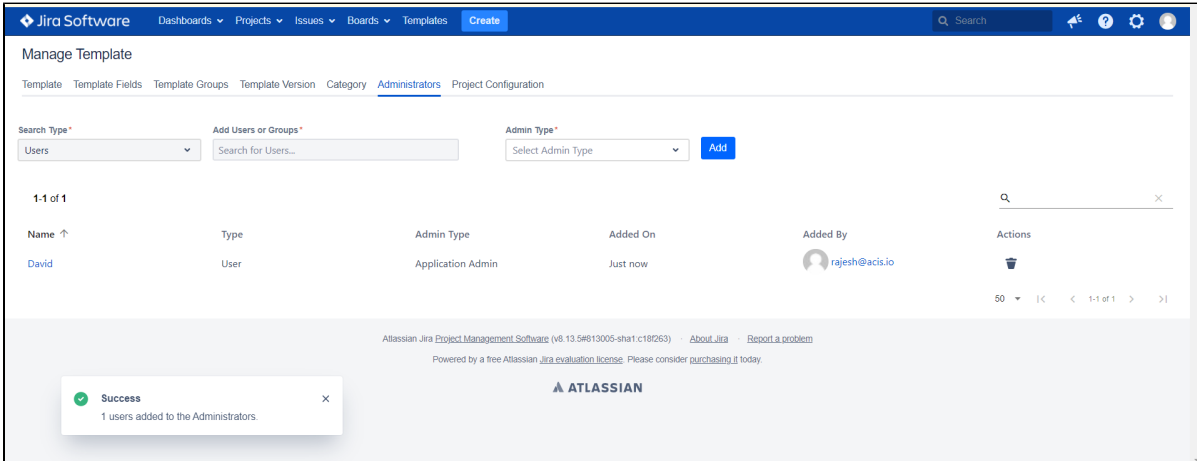
Step 1: In the Manage Template section, select the Administrators menu.

Step 2: In the Search Type box, search and select the type of Administrator to be added.

Step 3: Now in the Add Users or Groups box, search and select the required User or Group.

Step 4: In the Admin Type box select Application Admin or Template Admin based on the need.

Step 5: Click on the **Add** button.



The selected User or Group will be added as Administrator.

For more details refer: [User Management](#)

Project Configuration

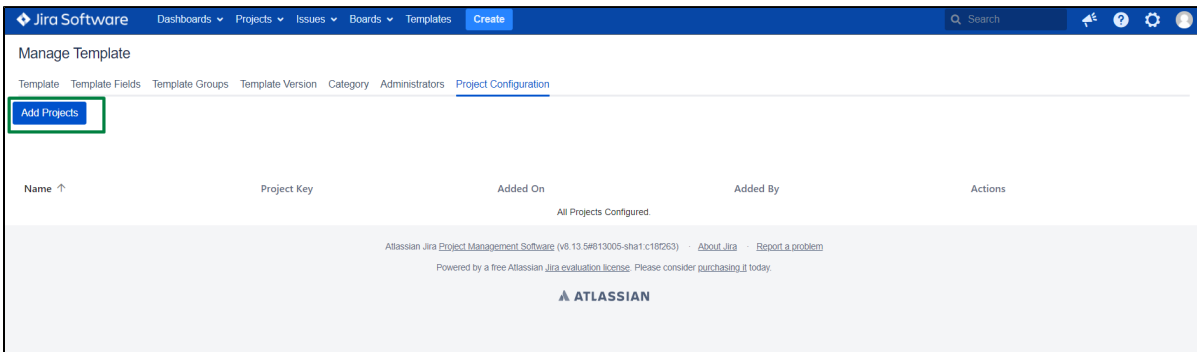
Note: Project Configuration can be done only by the JIRA Admin. If the JIRA Admin permits the Application Admin to Configure Projects, then Application Admin can also Configure Projects.

All the projects which need access to templates for their issues should be configured in the Project Configuration section by the Application Admin or JIRA Admin. The Project Configuration section allows configuring the required projects and removing the projects that are not needed.

Add a Project

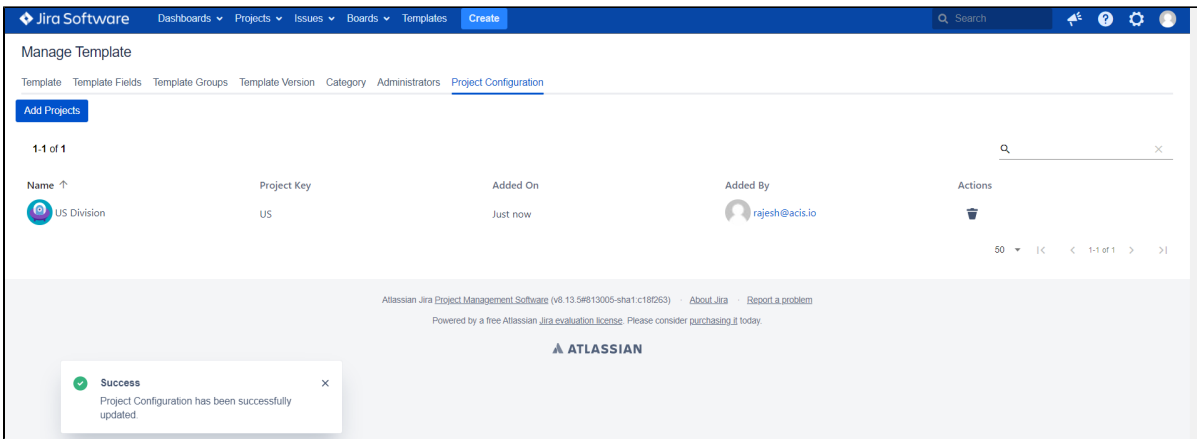
Step 1: In the Manage Template Section, select the **Project Configuration** menu.

Step 2: Click on the **Add Projects** button.



Step 3: On the appearing screen, select the required projects and click on the **Add** button.

The selected Projects will be Added.



For more details refer: [Project Configuration](#)

Category

A Category is used to divide or classify the templates based on the similar characteristics shared between them. One can add any category to the Template so that it will help in filtering the templates easily. Examples for the category are, Software, Hardware, etc.

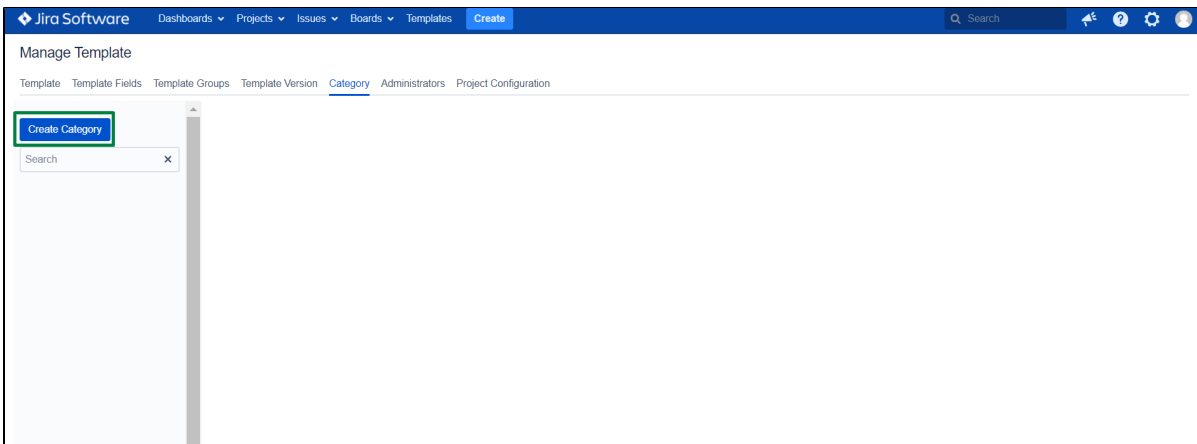
Creating a Category helps to find and maintain the Templates easily within the plugin. Any number of sub-categories can be created within a Category. These sub-categories also help in filtering the Templates.

For example, if "Software" is a category, then the sub-categories of Software are "Subscription", "License", etc.

Create

Step 1: In the Manage Template Screen, select the Category menu.

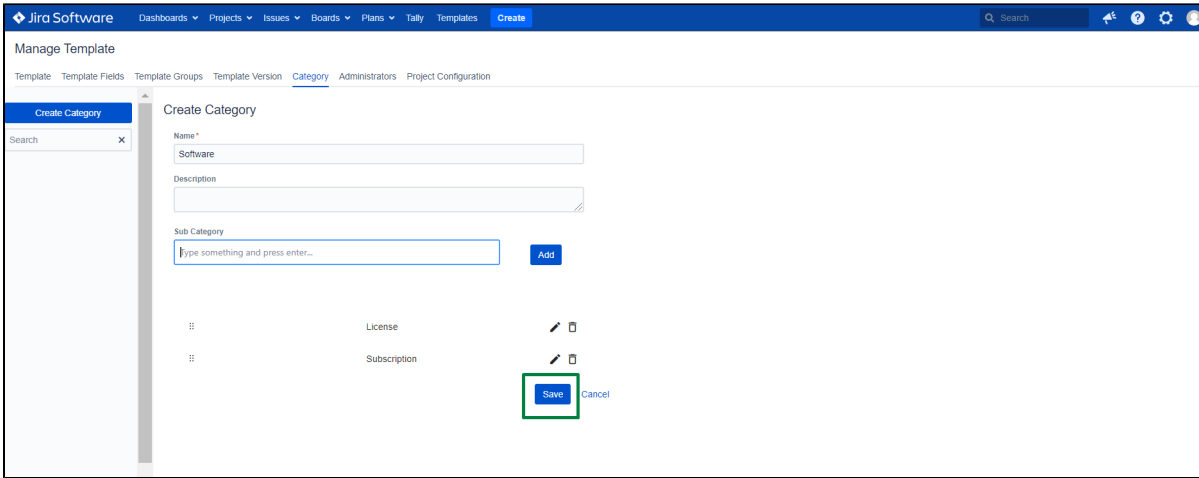
Step 2: Click on the **Create Category** button.



Step 3: On the appearing screen, fill in all the details and add sub-categories.

You can edit the added subcategory by clicking on the Actions icon and also delete the added sub-category by clicking on the Delete icon present near the added sub-category.

Step 4: Click on the **Save** button.



The Category will be created.

For more details refer: [Category](#)

Template Fields

Template Fields are headers to identify the information that will be populated in the Template. You can relate this to column headers in an excel template.

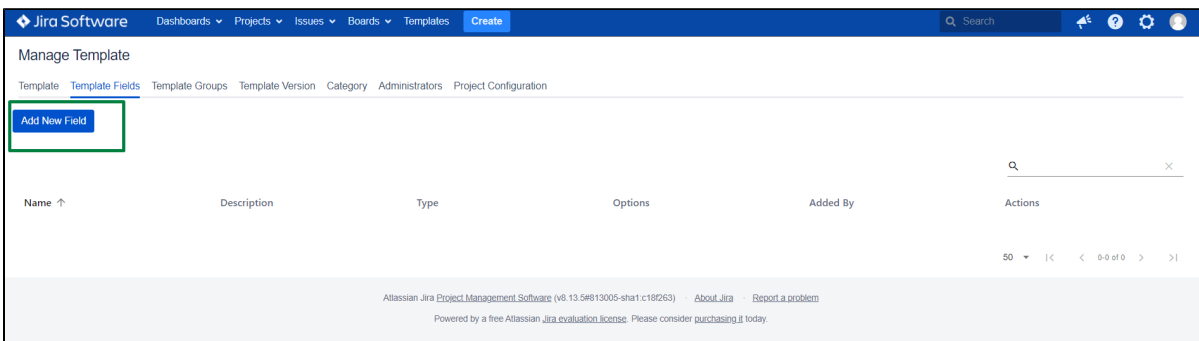
Template Fields are used for adding and displaying information associated with the Template. You can add different fields you need and modify them or delete them as required.

Different types of Template fields supported are as follows: Text Field, Text Area, User Picker, Multiple User Picker, Number Field, Single Select, Multiple Select, Date Field, Date-Time Field, URL Field, and Calculated Field.

Create

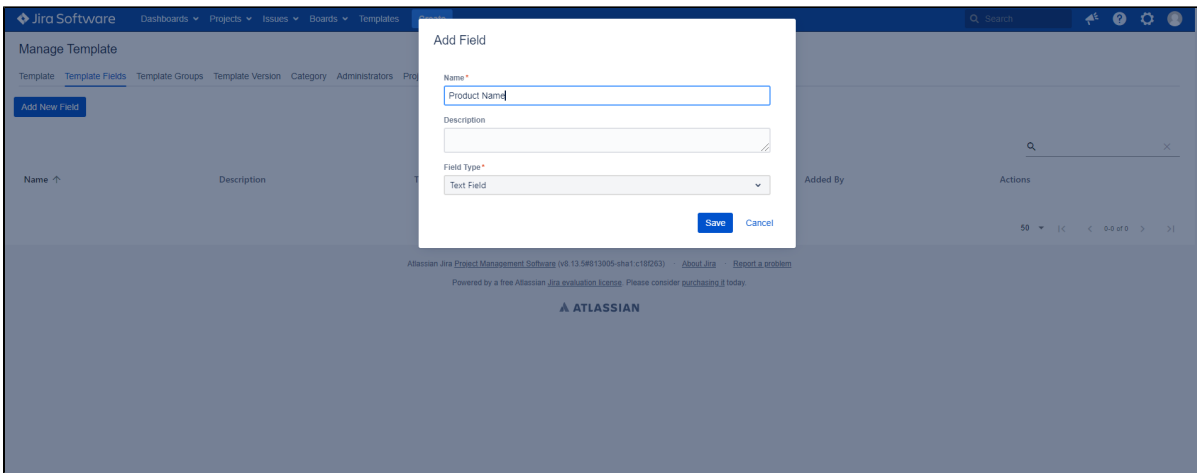
Step 1: In the Manage Template section, select the Template Fields menu.

Step 2: Click on the **Add New Field** button.



Step 3: In the Add Field screen, fill in all the details and select the required Field Type. (The field types supported are Text Field, Text Area, Number Field, Single Select, Multiple Select User Picker, User Picker Multiple, Date, Date-Time, Calculated Field.)

Step 4: Now add the options for the field Type selected in the **Add Options**. (Only Single Select and Multiple Select field types will have the Add Options)



Step 5: Click on the **Save** button.

The Template Field will be created.

For more details refer: [Template Fields](#)

Template

A Template is a preset layout, used as a base or organized structure for a particular application so that the format does not have to be recreated each time it is used.

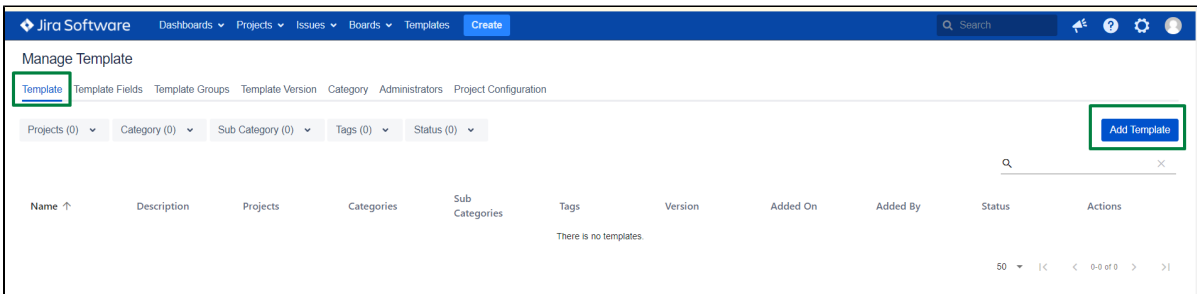
By clicking on the Template menu, you can view different types of templates available and you can add and download the templates. These templates can be used in various projects.

Create

Create your customized Template by adding the required Projects, Tags, Category and Editors. To create a template follow the steps given below.

Step 1: In the Manage Template section, Select the Template menu.

Step 2: Click on the **Add Template** button.



Step 3: On the appearing Add Template screen, fill in all the details including Projects, Tags, Category, and Editors.

Note: The Users added as Editors can do all the changes to the Template like the Template Owner who created the Template.

Step 4: Click on the Add Fields option to add the Template fields.

Step 5: On the appearing Template Fields screen, select the required Template Fields and click on the **Add** button.

Step 6: Click on the **Save** button.

Manage Template

Template | Template Fields | Template Groups | Template Version | Category | Administrators | Project Configuration

Add Template

Name *
Atlassian Marketing

Description

Project
US Division

Tags
Select...

Category
Software

Sub-Category
Licence

Add Editors
Users

Users
Search for Users...
Users who will be able to edit Template.

Editors:
Template Fields *
Add Fields (0)

Save Cancel

Add

The Template will be created as a draft Template.

Step 7: After creating the draft Template, publish the Template, to make it active.

Select the Template and in the Template Details page, click on the Settings icon and select the **Publish Version** option.

Manage Template

Atlassian Marketing **DRAFT**

Back ⚙️

- Edit Fields
- Reorder Fields
- Publish Version**
- Discard Draft
- Import Data

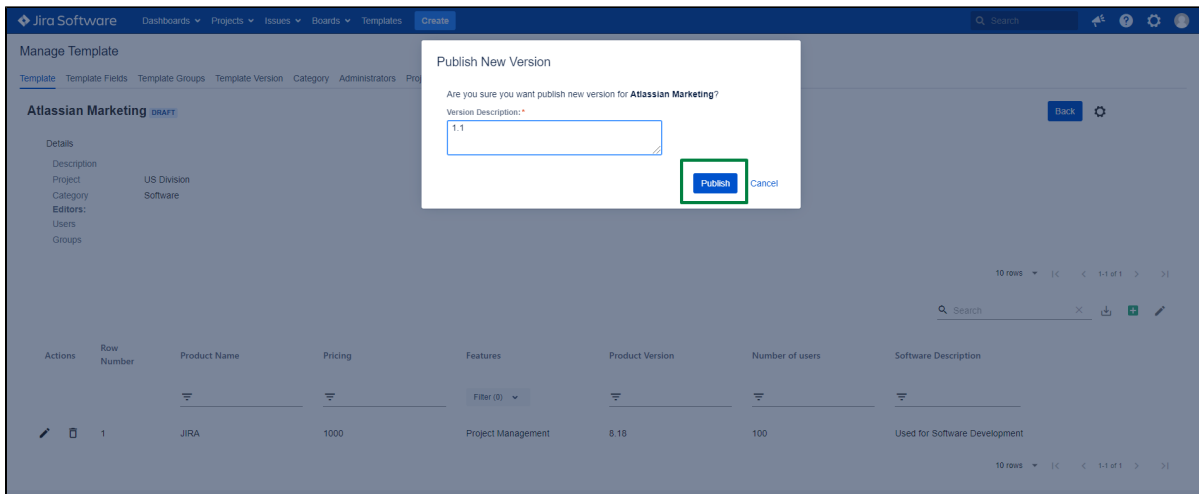
10 rows | < > 1 of 1

Search X

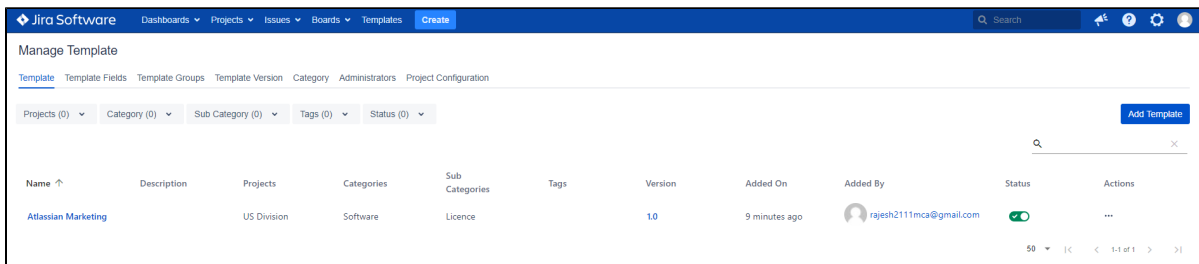
Actions	Row Number	Product Name	Pricing	Features	Product Version	Number of users	Software Description
	1	JIRA	1000	Project Management	8.18	100	Used for Software Development

10 rows | < > 1 of 1

Step 8: In the appearing Publish Version screen, give a Version description and click on the **Publish** button.



Now, the created template will become Active and it will become a version of the Template, which can be viewed in the Template Version section.



Note: Once you create the Template, you have to publish it so that it will be stored as a version in the Template Version section and also the Template will become active.

To view the Template Versions, you can navigate to the [Template Version](#) section.

For more details refer: [Template](#)

Template Group

A Template Group is a collection of templates or a set of templates, grouped based on certain criteria. You can add any number of templates to one Template Group. Simply Template group is a collection or assembly of templates grouped based on any particular context required by the Template Group Owner.

Note: Only the Published Templates can be added to Template Groups.

Create

If you need the templates to be classed or grouped then you can create the Template Group. To create a Template Group follow the steps given below.

Step 1: In the Manage Template section, select the Template Groups menu.

Step 2: Click on the **Create Template Group** button.

Step 3: On the appearing Create Template Group Screen, fill in all the details and add Project, Tags, Category, and Editors.

Step 4: Click on the **Add Templates** option, to add Templates to the Template Group.

Step 5: In the appearing Templates screen, select the required templates and click on the **Add** button.

Step 6: Click on the **Save** button.

Jira Software Dashboards Projects Issues Boards Templates **Create**

Manage Template

Template Template Fields **Template Groups** Template Version Category Administrators Project Configuration

Create Template Group

Search x

Create Template Group

Name *
Marketing

Description

Project
US Division x

Tags
Select...

Category Software Sub-Category Licence x

Add Editors Users
Users rajesh2111mca@gmail.c... x add more people... **Add**

Editors:
Templates * Add Templates (1)

Save Cancel

The Template Group will be created.

For more details refer: [Template Group](#)