



Template (Epic) Cloner for JIRA by Vilisoft Sp. z o.o.

User Manual

Version: 1.0.0



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Release notes

Release	Description
v. 1.0.0	Plugin introduction.



Introduction

Template (Epic) cloner for JIRA has been created for JIRA users who need to create the same tickets many times (repeatable tasks).

Template (Epic) Cloner for JIRA allows users to:

- create a template based on Epic, Issues in Epic and sub-tasks,
- mark issues as a template,
- clone Epic, Issues in Epic and sub-tasks at the same time,
- keep links between new cloned issues,
- edit Epic details before cloning:
 - Epic name,
 - Summary,
 - Due date,
 - Assignee,
- select Issues in Epic which should be cloned,
- edit issues before cloning:
 - Summary,
 - Assignee,
 - Due date,
 - Estimation,
- decide what should be copied:
 - Sub-tasks,
 - Attachments,
 - Comments,
 - Watcher,
- create dashboards and filters with templates only.

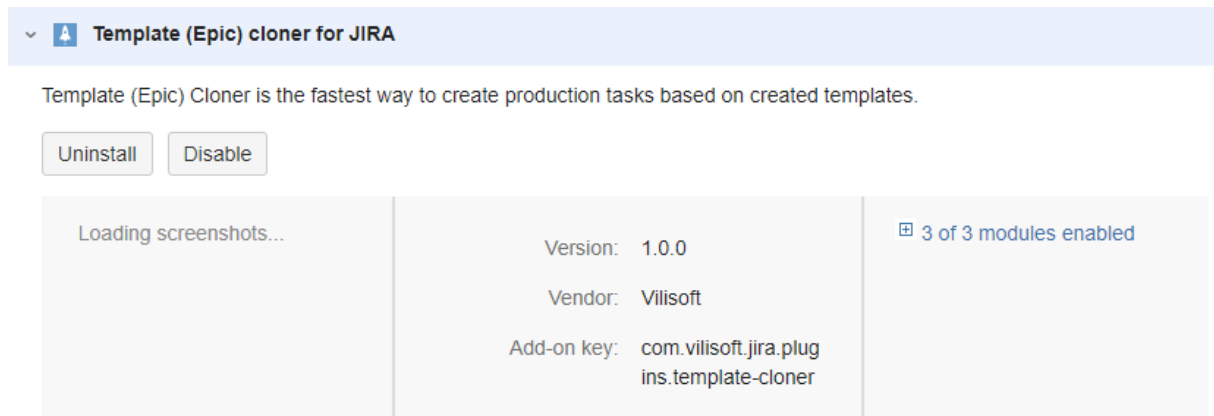
JIRA Administrator cases

How to install

Template (Epic) Cloner for JIRA is installed in standard way. More information you can find here:

<https://confluence.atlassian.com/upm/installing-add-ons-273875715.html>

After template installation, new add-on is visible on User-installed add-ons list (see picture below).



The screenshot shows the JIRA add-on management interface for 'Template (Epic) cloner for JIRA'. At the top, there is a header with a dropdown arrow, a lock icon, and the text 'Template (Epic) cloner for JIRA'. Below the header, a description states: 'Template (Epic) Cloner is the fastest way to create production tasks based on created templates.' Underneath the description are two buttons: 'Uninstall' and 'Disable'. Below the buttons is a table with three columns. The first column contains the text 'Loading screenshots...'. The second column contains the following information: 'Version: 1.0.0', 'Vendor: Vilisoft', and 'Add-on key: com.vilisoft.jira.plugins.template-cloner'. The third column contains the text '3 of 3 modules enabled'.

How to configure

JIRA Administrator doesn't need to configure anything special. After add-on installation, Template (Epic) cloner for JIRA is ready for being used by JIRA users.

New Custom field

During plugin installation new Custom Field is created:

Template Issue LOCKED Tick if task should be treated as template.	Checkboxes	Issue type(s): Global (all issues)
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New "Template Issue" custom field should be added to the screens and issues should be ticked as a template.

JIRA Users cases

Template creation

Template is composed of:


- One Epic issue,
- Any issues of any types linked to the Epic (relation “Epic link”),
- Any sub-tasks in the Epic and issues linked to the Epic.

Each template issues (Epic, Story, Tasks, Sub-tasks and all others issue types created in JIRA) should be ticked as a Template:

Template Issue Yes

Tick if task should be treated as template.

Example of Epic template looks like below:


JIRA Test / JT-77

Task (Epic) template 1

Edit
Comment
Assign
More ▾
Resolve Issue
Close Issue
Admin ▾


Details

Type:	+ Epic	Status:	OPEN
Priority:	▲ Major		(View Workflow)
Component/s:	Roll-out	Resolution:	Unresolved
Labels:	None		
Template:	Yes		
Epic Name:	Task (Epic) template 1		



Description

Please create...

Attachments

 Drop files to attach, or browse.

Sub-Tasks + ▾

1.	Sub-task 1		NEW	SafeApple Jira
2.	Sub-task 2		NEW	SafeApple Jira

Issues in Epic +

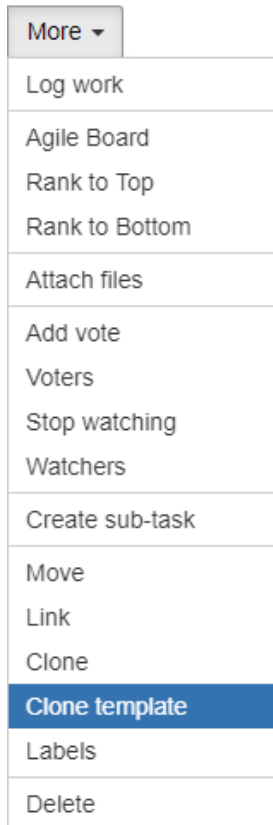
JT-78	Story Template 1 in the Epic Template	NEW	NEW	SafeApple Jira
JT-79	Story Template 2 in the Epic Template	NEW	NEW	SafeApple Jira
JT-80	Story Template 3 in the Epic Template	NEW	NEW	SafeApple Jira
JT-81	Story Template 4 in the Epic Template	NEW	NEW	SafeApple Jira
JT-82	Story Template 4 in the Epic Template	NEW	NEW	SafeApple Jira

Each Issues in Epic (Story, Tasks and others issue types created in JIRA) can contain own sub-tasks which are treated as a template also.

Cloning process

STEP 1:

In Epic choose “Clone template” from “More” menu:



STEP 2

In Clone Template window three sections will be displayed to set up cloning parameters.

Section 1 where base values can be entered for new Epic. Fields which can be entered are described in the table below.


Epic Field	Description
New Epic Name	If necessary, Epic Name can be changed. New Epic will be created with value entered to this field.
New Epic Summary	If necessary, Epic Summary can be changed. New Epic will be created with value entered to this field.
New Epic Assignee	Proper person can be assigned to new Epic.
New Epic Due Date	Due Date for new Epic can be set.

Task (Epic) template 1


Clone template: JT-77

New Epic Name*

New Epic Summary*

New Epic Assignee 

Start typing to get a list of possible matches.

New Epic Due Date 

Section 1: Epic details

Here you can change Epic fields before clone

Clone components

- Sub-tasks
- Attachments
- Watchers
- Comments

It is applied to Epic, Issues in Epic and sub-tasks.

Section 2: Components

Here you can decide which components should be cloned

Section 3: Issues in Epic

Here you can choose issues which should be cloned and change their details

Epic linked issues

<input checked="" type="checkbox"/>	T	Key	P	Summary	Assignee	Due date	Estimate
<input checked="" type="checkbox"/>		JT-78		Story Template 1 in the Epic T	<input type="text" value="jira"/> 	<input type="text" value="21/Oct/17"/> 	<input type="text" value="3d"/>
<input checked="" type="checkbox"/>		JT-79		Story Template 2 in the Epic T	<input type="text" value="jira"/> 	<input type="text" value="14/Sep/17"/> 	<input type="text" value="5w"/>
<input checked="" type="checkbox"/>		JT-80		Story Template 3 in the Epic T	<input type="text" value="jira"/> 	<input type="text" value=""/> 	<input type="text" value="8h"/>
<input checked="" type="checkbox"/>		JT-81		Story Template 4 in the Epic T	<input type="text" value="jira"/> 	<input type="text" value="23/Nov/17"/> 	<input type="text" value="2d 2h"/>
<input checked="" type="checkbox"/>		JT-82		Story Template 4 in the Epic T	<input type="text" value="jira"/> 	<input type="text" value="5/Dec/17"/> 	<input type="text" value="8w 3d 1h"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JT-83		Task Template 1 in the Epic Te	<input type="text" value="jira"/> 	<input type="text" value="5/Dec/17"/> 	<input type="text" value="12d"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JT-84		Task template 2 in the Epic Te	<input type="text" value="jira"/> 	<input type="text" value=""/> 	<input type="text" value="1w"/>

Section 2 where you can decide which issues elements should be cloned. It is applied to Epic, all Issues in Epic and sub-tasks.

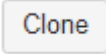
Option	Description
Sub-tasks	Issues can be cloned with sub-tasks.
Attachments	Issues can be cloned with attachments.
Watchers	Issues can be cloned with watchers.
Comments	Issue can be cloned with comments.

Section 3 where list of Issues in Epic is displayed and where:

- Issues in Epic can be marked for being cloned,
- New issues parameters can be set.

Issue Field	Description
Summary	If necessary, Summary for newly created issue can be changed.
Assignee	If necessary, specific JIRA user can be assigned to newly created issue.
Due date	If necessary, Due date can be set for newly created issue.
Estimate	If necessary, Estimate can be set for newly created issue.

STEP 3

When clicking  button, clone process will be executed.