A template is a preconfigured environment that includes workflows, automation, and integration between Atlassian Jira and Insight. In this section, you will find out how templates work in Insight, what happens in Jira when you use an Insight template, what kind of scenarios are included in each template, and how to create a new project using a template.

How do templates work?

Using a template to create a Jira project adds the following to your Jira instance:

- a Jira project
- a workflow scheme
- workflows
- screen schemes
- screens
- an issue type scheme
- an issue type screen scheme
- issue types
- custom fields
- Jira users
- Insight post-functions

Insight data is also created to integrate with your Jira project:

- an object schema
- object types with attributes
- object type references

If you selected to create the environment with sample data, Jira issues and Insight objects are also created.

Creating a new project from a template

When you create a new project in Jira, you can choose to create a project from a preconfigured Insight template. Currently, only one type of template is available: Insight IT Service Management. You can create a new project from a template with or without sample data.

To create a project from an Insight template without sample data:

1. In the top menu, click Projects > Create project.
2. Under the Business header, select the type of template you wish to use. Currently, the only option is Insight IT Service Management.
3. Review the issue types and custom fields that will be created and click Select.
4. Enter a Name, Key, and Project Lead for the project.
5. Click Submit to create the project.

To create a project from an Insight template with sample data:

1. In the top menu, click Projects > Create project.
2. At bottom, click Create sample data.
3. Under the Business header, select the type of template you wish to use. Currently, the only option is Insight IT Service Management.
4. Review the issue types and custom fields that will be created and click Select.
5. Enter a Name, Key, and Project Lead for the project.
6. Click Submit to create the project.