

# Managing category schemes

From 2.0.0 version the app has switched from project-specific configuration of categories to category schemes. You can create a shared category scheme and apply it to multiple projects at once. All modifications in the category scheme will be automatically propagated to all the associated projects.

You can perform the following operations on category schemes:

- [Creating a new category scheme](#)
  - [Managing categories](#)
  - [Managing category visibility per issue types](#)
  - [Managing access restrictions for categories](#)
  - [Managing auto-distribution rules for categories](#)
  - [Setting Size of Image Thumbnails](#)
  - [Configuring the look of the Attachment field](#)
- [Editing the category scheme](#)
- [Associating the category scheme with projects](#)
- [Copying the category scheme](#)
- [Deleting the category scheme](#)

## Creating a new category scheme

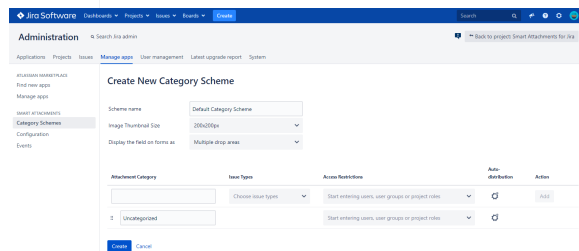
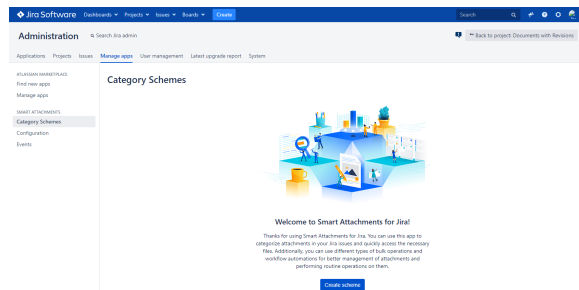
1. Open the Jira administration console.
2. Select the **Manage apps** tab.
3. On the sidebar, locate the **Smart Attachments** menu group.
4. Select **Category Schemes**. The Category Schemes page opens, as follows:
5. Click **Create scheme**.
6. Enter the scheme name.
7. Click **Create**.

A new category scheme is created. Now you can manage categories and their parameters in the category scheme.

All the category schemes can fall into two types:

- **project-specific** - category schemes that are used only by one project.
- **shared** - category schemes that are used by multiple projects.

The main difference between them is that you can modify the project-specific category scheme within the project administration section. The shared category scheme can be edited only in the Category Schemes section.



## Managing categories

You can manage categories within the category scheme. You can add, edit, and delete categories.

**To create a new category:**

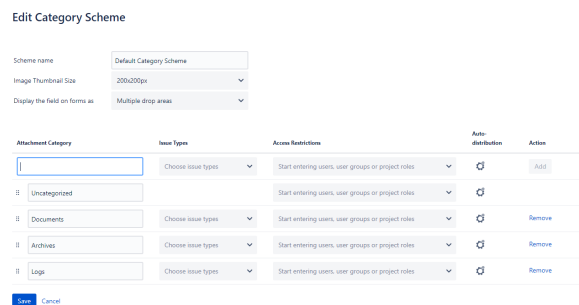
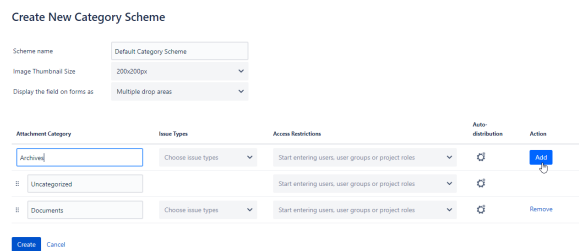
1. Above the list with categories, locate the box to enter a category scheme name.
2. Enter the category name.
3. Click **Add**.
4. Click **Save**.

**To edit the category:**

1. On the list with categories, locate the one you want to edit.
2. Position the mouse pointer within the box with the category name.
3. Update the category name.
4. When complete, click **Save**.

**To delete the category:**

1. On the list with categories, locate the one you want to delete.



2. Click **Remove**.
3. When complete, click **Save**.



Please consider the following while managing categories in the scheme:

1. You cannot delete the default category names as 'Uncategorized'. You can only rename it.
2. When you delete the category, all the attachments stored within it will be moved to Uncategorized automatically.
3. If you are modifying the shared category scheme, all the modifications will be propagated to all projects associated with this scheme.

## Managing category visibility per issue types

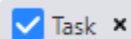
You can manage visibility of categories in specific issue types. This way you can show a category in one issue type, and hide it in another issue type. You can use this to hide unnecessary categories and save a bit of screen space.

### To set category visibility for issue types:

1. Locate the category which visibility per issue type you want to configure.
2. Select issue types in which you want to show the category.
3. When complete, click **Save**.

### To remove an issue type:

1. Locate the issue type you want to remove in a specific category.
2. Click the **Remove** icon within the issue type label



3. When complete, click **Save**.

To remove all issue types and make the category visible in all issue types, click the icon. Click **Save**.



By default, all categories within the scheme are shown in all issue types.

You cannot set visibility of the default category (Uncategorized) in different issue types.

### Edit Category Scheme

Scheme name: Default Category Scheme  
 Image Thumbnail Size: 200x200px  
 Display the field on forms as: Multiple drop areas

Attachment Category	Issue Types	Access Restrictions	Auto-distribution	Action
Uncategorized	Choose issue types	Start entering users, user groups or project roles		Add
Documents	<input checked="" type="checkbox"/> Task <input checked="" type="checkbox"/> Sub-task	Start entering users, user groups or project roles		Remove
Archives	<input checked="" type="checkbox"/> Improvement <input checked="" type="checkbox"/> New Feature <input checked="" type="checkbox"/> Bug <input checked="" type="checkbox"/> Epic <input checked="" type="checkbox"/> Story	Start entering users, user groups or project roles		Remove
Logs	Choose issue types	Start entering users, user groups or project roles		Remove

Save Cancel

## Managing access restrictions for categories

You can set up access restrictions for categories. While configuring access restrictions, you need to consider which type of the category scheme you are using. For shared category schemes, you need to consider that the same user may have different roles. In this case the user can get access to categories which should be hidden from the this user.

### To set access restrictions for a category:

1. Locate the category which you want to set access restrictions for.
2. Start entering name of a user, user group, or project role.
3. Select the appropriate entry from the list of matches.
4. When complete, click **Save**.

### To remove a user / user group / project role from access restrictions:

1. Locate the user / user groups / project role you want to remove from access restrictions of a specific category.

2. Click the **Remove** icon within the label


### Edit Category Scheme

Scheme name: Default Category Scheme  
 Image Thumbnail Size: 200x200px  
 Display the field on forms as: Multiple drop areas

Attachment Category	Issue Types	Access Restrictions	Auto-distribution	Action
Uncategorized	Choose issue types	Start entering users, user groups or project roles		Add
Documents	<input checked="" type="checkbox"/> Task <input checked="" type="checkbox"/> Sub-task	<input checked="" type="checkbox"/> jira-administrators <input checked="" type="checkbox"/> Administrators <input checked="" type="checkbox"/> Admin-Release-admins <input checked="" type="checkbox"/> me		Remove
Archives	Choose issue types	admins		Remove
Logs	Choose issue types	product-managers project-managers		Remove

Cancel



- When complete, click **Save**.


To clear all access restrictions for a specific category, click the  icon. Click **Save**.

## Managing auto-distribution rules for categories

You can configure auto-distribution rules for categories. These rules will allow the app to automatically categorize uploaded files according to the pre-defined rules.

To set auto-distribution rules for a category:

- On the list with categories, locate the one which you want to configure auto-distribution rules for.
- Click the  or  icon. Look of the icon may differ depending on the already configured auto-distribution rule.
- In the **Configure Distribution Rule** form, define the following parameters:
  - Match type** - select the way to match files for automatic distribution across categories:
    - Name pattern** - naming pattern for simple cases.
    - Regexp** - regular expression for complex cases.
  - Value** - enter the value for the selected match type.
- When complete, click **Save**.
- Save the category scheme.

 Regular expressions allow you to quickly enter the flexible query for matching specific attachments in categories.

For example, you want to proceed only attachments with \*.docx or \*.pdf formats. You need to enter the following regular expression `'(.*?)\.docx|pdf)$'`.

### Configure Distribution Rule

Match type

Name pattern

Value


docx, doc, rtf, txt

Save Cancel

## Setting Size of Image Thumbnails

Smart Attachments add-on allows you to set the appropriate size of image thumbnails for each Jira project.

- Open the category scheme for editing.
- Select the appropriate size of image thumbnails from the following ones:
  - 50x35 px
  - 50x50 px
  - 75x50 px
  - 75x75 px
  - 100x70 px
  - 100x100 px
  - 150x110 px
  - 150x150 px
  - 200x145 px
  - 200x200 px
- When complete, click **Save**.





 The default size of image thumbnails in Jira is 200x200 px.

### Edit Category Scheme

Schema name: Default Category Scheme

Image Thumbnail Size: 300x100px

Display the field on forms as: 300x100px

Attachment Category	Image Thumbnail Size	Access Restrictions	Auto-distribution	Action
Uncategorized	150x110px	Start entering users, user groups or project roles		Add
Documents	200x145px	Jira administrators   Administrators   Admins   Fullsearch-admins		Remove
Archives	Choose issue types	Start entering users, user groups or project roles		Remove
Logs	Choose issue types	Start entering users, user groups or project roles		Remove

Save Cancel

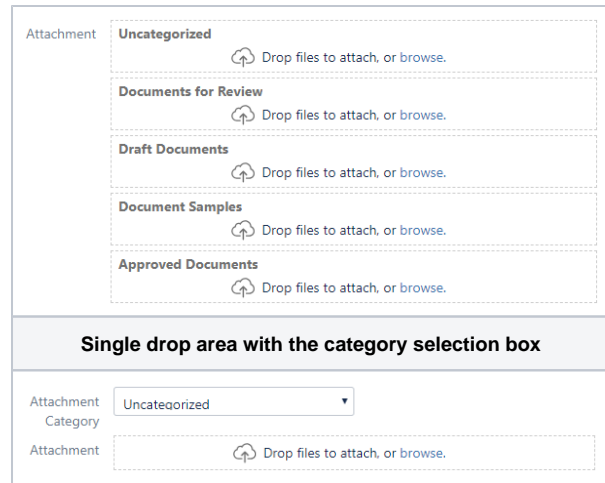
## Configuring the look of the Attachment field

Since [Smart Attachments 1.17.2](#), you can configure the look of the Attachment field on transition forms.

- Open the category scheme for editing.
- In the **Display the field on forms as** option, select the look of the Attachment field, as follows:
  - Multiple drop areas** - allows you to upload files to multiple categories on transition forms.

Multiple drop areas

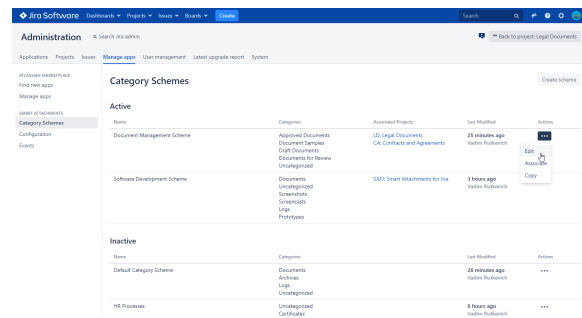
- **Single drop area with the category selection box** - allows you to upload files into one category only.
3. When complete, click **Save**.



## Editing the category scheme

You can modify configuration of schemes. The app uses the locking of category schemes, so you may not be able to modify the category scheme while another user is editing it. The default locking timeout is five minutes. The locking is automatically removed upon expiry of this timeout, if no actions are performed on the category scheme. All the unsaved modifications may be lost.

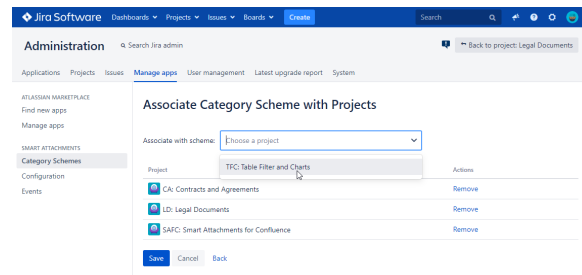
1. On the list with category schemes, locate the one you want to edit.
2. Click the **More** button.
3. Select **Edit**.
4. Make the appropriate modifications in the category scheme.
5. When complete, click **Save**.



## Associating the category scheme with projects

You can associate one category scheme with one or multiple projects. The category scheme which is associated with multiple projects becomes a shared category scheme. All modifications in this scheme will be automatically propagated to all the associated projects.

1. On the list with projects, locate the one you want to associate with projects.
2. Click the **More** button.
3. Select **Associate**.
4. Start entering the name of the project you want to associate with the category scheme.
5. When complete, click **Save**.



The category scheme will be associated with the specified project. Categories will be shown according to the category scheme settings.

### To remove the association of the project with the category scheme:

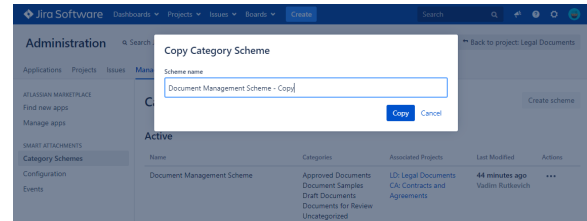
1. On the list with projects, locate the one which you want to de-associate from the category scheme.
2. Click **Remove**.
3. When complete, click **Save**.

**i** All the attachments from categories will become unategorized. Please be careful while de-associating projects with the category scheme.

## Copying the category scheme

1. On the list with category schemes, locate the one you want to associate with projects.
2. Click the **More** button.
3. Select **Copy**.
4. In the **Copy Category Scheme** form, specify the scheme name.
5. Click **Copy**.

A newly copied scheme is automatically placed into the inactive schemes. It is not associated with any projects.



## Deleting the category scheme

You can delete the category scheme which is not associated with any project (being in the Inactive Schemes list).

1. On the list with category schemes, locate the one you want to associate with projects.
2. Click the **More** button.
3. Select **Delete**.
4. In the **Delete Category Scheme** form, click **Delete**.

