

Smart Attachments for Jira Cloud - Getting Started

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This is quick start guide for Smart Attachments for Jira Cloud. If you use Smart Attachments for Jira Server or Data Center, please see [this documentation](#).

About

The Smart Attachments app for Jira Cloud lets you tag documents with labels and use them for better file searchability in Jira issues. Now you can instantly find the required document in a blink of an eye.

Take advantage of the following capabilities:

- [Tagging attachments with labels](#)
- [Removing labels from attachments](#)
- [Filtering attachments by label](#)
- [Grouping attachments by label](#)
- [Grouping attachments by date](#)
- [Grouping attachments by uploader](#)
- [Managing bulk operations on attachments](#)
- [Administering labels](#)
 - [Editing the label name](#)
 - [Picking a new color for labels](#)
 - [Deleting a label](#)
- [Configuring the validator](#)
- [Searching for issues having attachments with a specific label](#)

Managing Labels of Attachments

The Smart Attachments for Jira Cloud app allows you to manage labels for attachments within issues, as follows:

- [tag attachments with labels](#)
- [remove labels from attachments](#)
- [filter attachments by label](#)
- [group attachments by label](#)

Tagging attachments with labels

1. Open the issue with attachments you want to tag with labels.

2. On the issue sidebar, click **Open Smart Attachments**.

Projects / Smart Attachments for Confluence / SAFC-32

Sharing folders with users

Attach Create issue in epic Link issue Link Confluence page

Description

Add a description...

Attachments



Issues in this epic

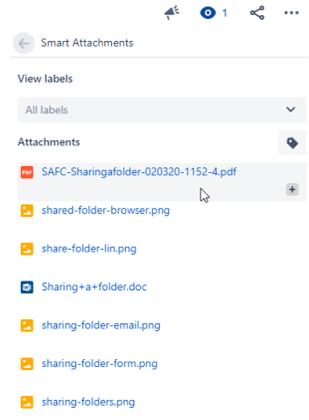
There are no issues in this epic

Activity

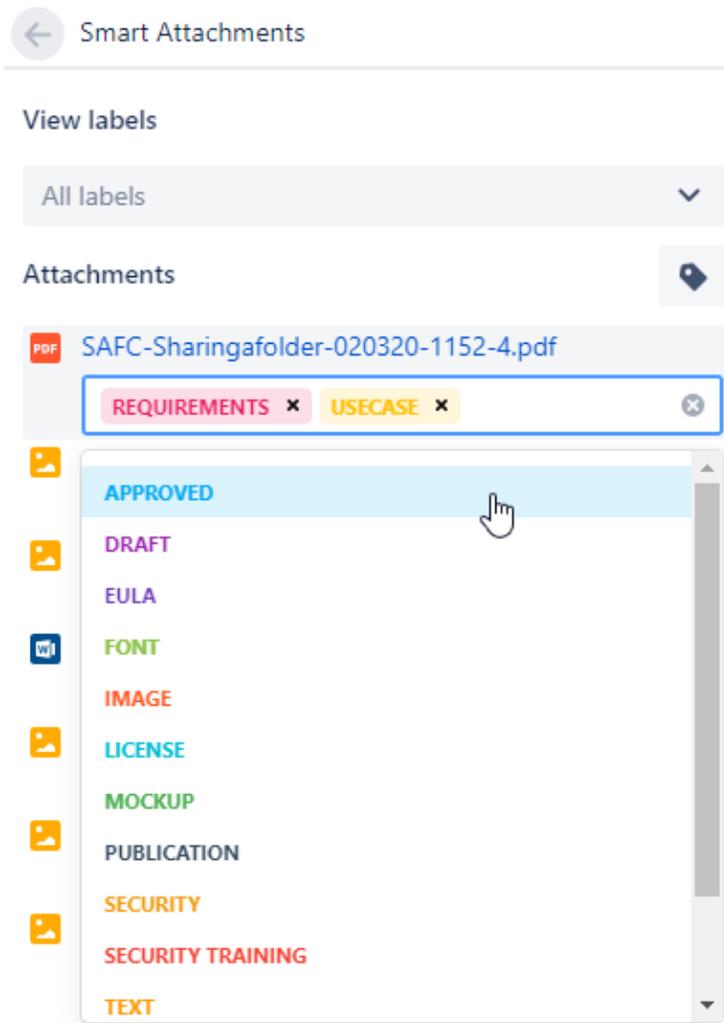
Show: Comments History Work log

Add a comment...

Pro tip: press **M** to comment



- 3. Hover over the attachment and click the **+** icon.
- 4. Start entering the label and select from the prompted matches.

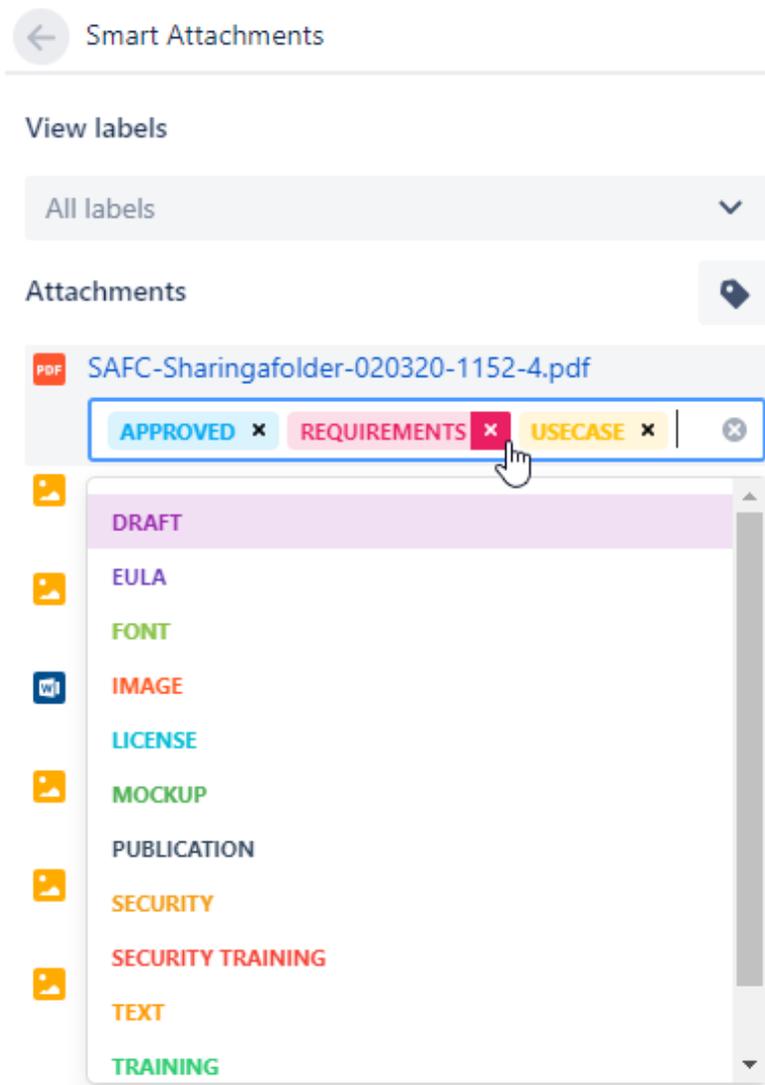


- 5. If the label you enter does not exist, the app will prompt you to create a new label.

i You add up to 5 labels to one attachment or document.

Removing labels from attachments

1. Open the issue with attachments which you want to remove labels from.
2. Hover over the attachment and click the  icon.

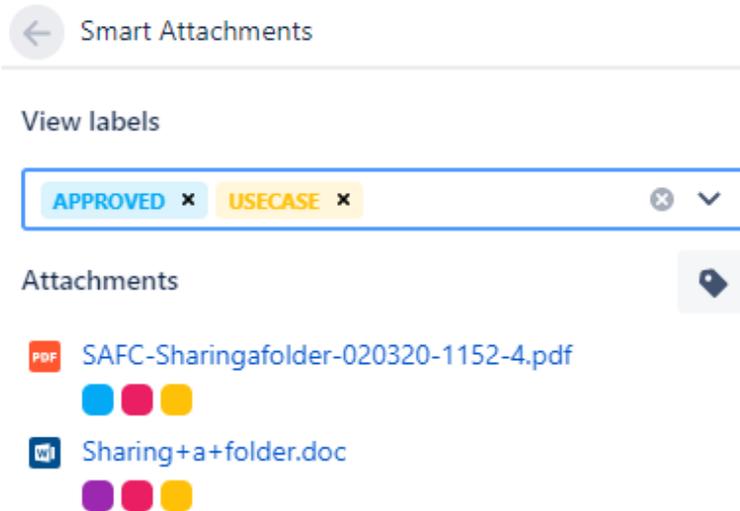


3. Delete one or multiple labels.

Filtering attachments by label

1. Above the list with attachments, locate the View labels box.
2. Select one or multiple labels to view attachments that has any of the selected labels.

3. The app will automatically filter attachments by label.



You can also click a specific label on the list with attachment to start filtration of attachments by label.

Grouping attachments by label

You can group attachments by labels (like by categories). The app saves the grouping option per project.

1. Open the issue.

2. Click the  icon.

3. Select **Group by label**. The app will group attachments by labels, as follows:

View labels

All labels 

Attachments 

APPROVED **MOCKUP**

 shared-folder-browser.png  No grouping

 share-folder-lin.png  Group by label

APPROVED **REQUIREMENTS** **USECASE**

 SAFC-Sharingafolder-020320-1152-4.pdf

DRAFT **MOCKUP**

 sharing-folder-email.png

 sharing-folder-form.png

 sharing-folders.png

DRAFT **REQUIREMENTS** **USECASE**

 Sharing+a+folder.doc

Grouping attachments by date

You can group attachments by dates. The app saves the grouping option per project.

1. Open the issue.
2. Click the  icon.
3. Select **Group by date**. The app will group attachments by upload dates, as follows:

All labels 

Attachments 

05/22/2020

-  app marketpl 
-  app marketpl 
-  app marketpl 
-  app marketplace total installs 2020.xlsx
-  app marketplace total users.csv 
-  app marketplace total users 2020.xlsx
-  Marketplace Top Selling Apps.xlsx 

07/07/2020

-  6c309296b69bda56c6480f805f3db152.jpg 
-  940320e8ec471b0d39dacc4e529388dd.jpg 
-  d3750ea01e6d955edfdbfbbb295dec86.png

-  No grouping
-  Group by label
-  Group by uploader
-  Group by upload date

Grouping attachments by uploader

You can group attachments by dates. The app saves the grouping option per project.

1. Open the issue.

2. Click the  icon.

3. Select **Group by uploader**. The app will group attachments by uploaders, as follows:

View labels

All labels 

Attachments 

LARRY STENFER

 asset (1).png



 asset (2).png



 asset (3).png



-  No grouping
-  Group by label
-  Group by uploader
-  Group by upload date

VADIM RUTKEVICH

 Employee Performance Ratings for Your Business.pptx



 Spreadsheet Issue Editor for Your Teams.pptx



 User Profile Manager for Your Teams.pptx



Managing bulk operations on attachments

1. Open the issue with attachments.
2. Open the **Smart Attachments** section.
3. Select the attachments which you want to perform a bulk operation on.
4. Select the operation you want to perform.
5. Select labels you want to add or replace the existing labels with.
6. Confirm the operation.

Label Management

[Attach](#)
[Create subtask](#)
[Link issue](#)

Description

Add a description...

Attachments

Information Security Managemen...2014.pdf 4.1 MB	PCI_DSS-QRG-v3_2_1.pdf 2.6 MB	IT-Security-Policy-Handbook.pdf 2.2 MB	PCI-DSS-v3_2_1-ROC-...late.pdf 2.5 MB
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Activity

Show: **Comments** History Work log



Add a comment...

Pro tip: press **M** to comment

Smart Attachments

- IT-Security-Policy.pdf
- IT-Security-Policy-Handbook.pdf
- manage issues like a pro.txt
- PCI_DSS_Glossary_v3-2.pdf
- PCI_DSS_Summary_of_Changes_3-2-...
- PCI_DSS_v3-2-1 (1).pdf
- PCI_DSS-QRG-v3_2_1.pdf
- PCI-DSS-v3_2_1-ROC-Reporting-Tem...
- ZNjXqvxTRg.jpg
- Управление документами в Jira и С...

Operation

Add labels

Labels

ISO 27001

ISO 27018

Add labels

Cancel

Administering labels

1. Navigate to Jira administration > Apps.
2. Locate the Smart Attachments section and click **Label management**.
3. On the opened page, you can see the list of labels registered in your Jira Cloud instance.

You can edit the label names and delete the no longer needed labels.

Jira Your work Projects Filters Dashboards People Apps Create

Search

Labels management

Name	Code	Color	Sample	Action
APPROVED	#16A085	■	APPROVED	Delete
CALCULATED	#CDDC39	■	CALCULATED	Delete
COUPON	#9B59B6	■	COUPON	Delete
DATA SCIENCE	#27AE60	■	DATA SCIENCE	Delete
DOCUMENT	#3498DB	■	DOCUMENT	Delete
GROWTHHACKING	#8BC34A	■	GROWTHHACKING	Delete
HANDBOOK	#C0392B	■	HANDBOOK	Delete
HOWTO	#3498DB	■	HOWTO	Delete
ILLUSTRATION	#9B59B6	■	ILLUSTRATION	Delete
IMAGE	#FF5722	■	IMAGE	Delete
ISO 22301	#795548	■	ISO 22301	Delete
ISO 27001	#34495E	■	ISO 27001	Delete
ISO 27018	#8E44AD	■	ISO 27018	Delete

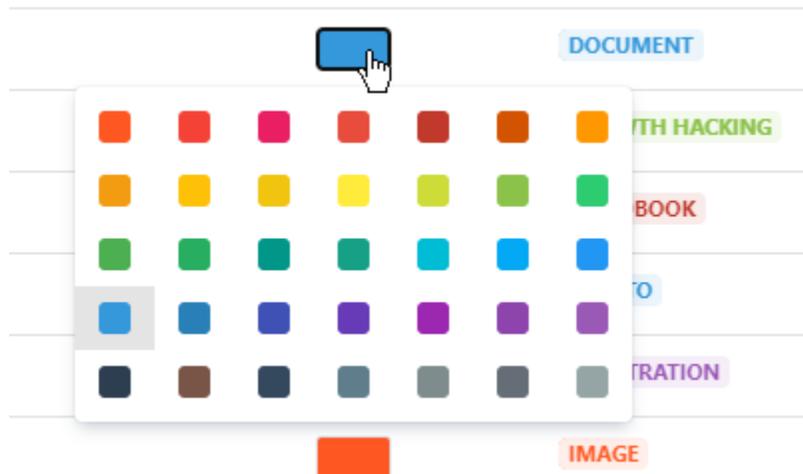
Editing the label name

1. Hover over the label name and click it.
2. Update the name.
3. Click the Confirm icon to save the updated name.

DATA SCIENCE	#27AE60
DOCUMENT	#3498DB
GROWTH HACKING	#8BC34A
HANDBOOK	#C0392B
HOWTO	#3498DB

Picking a new color for labels

1. Click the color picker.
2. Select a new color.



Deleting a label

You can delete the no longer needed labels. The label is deleted for the entire Jira Cloud instance.

1. Locate the label you want to delete.
2. Click **Delete**.
3. Confirm the removal of the label.

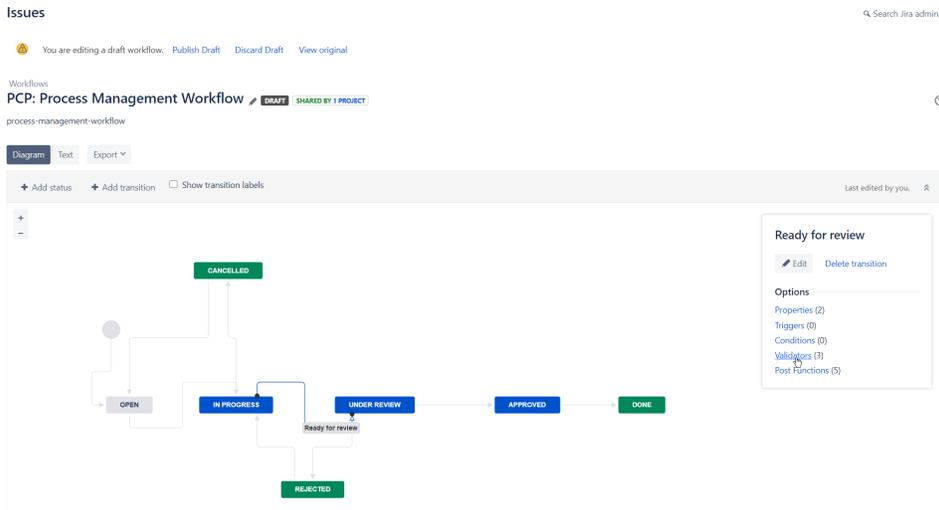
Configuring the validator

You can create and configure a validator to check presence of attachments having a specific label. If not, the validator will disallow transition of the issue to the following statuses, until a file with a specific label appears.

This can be used for situations when you perform the document review, so the task cannot be closed until an approved document appears.

1. Open the workflow which you want to add a validator into.

2. Select the transition where you want to add a validator.



3. Select **Validators**.

4. On the list with validators, click **Add validator**.

The screenshot shows the configuration for the 'Ready for review' transition. It displays a visual representation of the transition between 'IN PROGRESS' and 'UNDER REVIEW' states. Below this, it shows the configuration for the transition, including a list of validators. The 'Validators' section is expanded, showing three validators: 'Issue has attachments with the following labels: ASSET, DOCUMENT, IMAGE, ISO 27017, INEX', 'Checks for the presence of attachments with the following labels: ASSET, DOCUMENT', and 'Checks for the presence of attachments with the following labels: ASSET, ISO 27017'. An 'Add validator' button is visible in the top right corner of the validator list.

5. Select the Issue has attachments with labels validator.

Administration

Add Validator To Transition

Name	Description
<input type="radio"/> Date Compare Validator	Compare two dates during a workflow transition.
<input type="radio"/> Date Window Validator	Compares two date fields, by adding a time span in days to one of them.
<input type="radio"/> Field Required Validator	Field must not be empty during the transition.
<input type="radio"/> Field has been modified Validator	Field value must be changed during the transition.
<input type="radio"/> Field has single value Validator	Multi-select Field has not more than one value during transition.
<input checked="" type="radio"/> Issue has attachments with labels (by Smart Attachments)	This validator will allow the transition only if the issue has any attachment with required labels.
<input type="radio"/> Parent Status Validator	Validates that the parent issue is in required state.
<input type="radio"/> Permission Validator	Validates that the user has a permission.
<input type="radio"/> Previous State Validator	Validates that the issue has previously transitioned through a specific state.
<input type="radio"/> Regular Expression Check	Validate field contents against a regular expression during a workflow transition.
<input type="radio"/> User Permission Validator	Validates that the user has a permission, where the OSWorkflow variable holding the username is configurable. Obsolete.

Add Cancel

6. Click **Add**.

7. Choose one or multiple labels for checking documents. The app uses the OR operator for validating the presence of labels.

Administration

Add Parameters To Validator

Add required parameters to the Validator.

▼

DOCUMENT

ASSET

TEXT

ISO 27017

NEX

IMAGE

ONLY

8. Click **Add**.
9. Publish the workflow.

Searching for issues having attachments with a specific label

You can search for issues having attachments with a specific label. Please use the following JQL queries for this:

- **attachmentLabel = Approved** - finds issues having attachments with the APPROVED label. The name of the label can be changed.
- **attachmentLabel IN ('Asset', 'Document')** - finds issues having attachments with the ASSET or DOCUMENT label. The names of labels can be changed.