How to manage category scheme settings

Set image thumbnail size

You can choose the appropriate size of image thumbnails for each category scheme.

1. Open the Jira administration console.
2. Select the **Manage apps** tab.
3. On the sidebar, locate **Smart Attachments > Category Schemes.**
4. On the list with category schemes, locate the one you want to edit.
5. Click the **More** button.
6. Select **Edit**.
7. 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
8. Click **Save**.

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

Configure the look of the Smart Attachment field

Since Smart Attachments 1.17.2, you can configure the look of the Attachment field on transition forms.

a. Open the category scheme for editing.
b. In the **Display the filed 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

Attachment   **Uncategorized**
         ☁ Drop files to attach, or browse.

Documents for Review
         ☁ Drop files to attach, or browse.

Draft Documents
         ☁ Drop files to attach, or browse.

Document Samples
         ☁ Drop files to attach, or browse.

Approved Documents
         ☁ Drop files to attach, or browse.

- **Single drop area with the category selection box** - allows you to upload files into one category only

Attachment Category [Uncategorized ▾]

Attachment [☁ Drop files to attach, or browse.]

3. Click **Save**.

Manage attachment categories of the scheme

You can manage categories within the category scheme when you create a new category scheme or later during its editing. Smart Attachments for Jira allows to:

- add scheme categories
- edit scheme categories
- delete scheme categories

Create a new category

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

You can create as many scheme categories as you need. By default, you have one category in each new scheme - **Uncategorized**. It will be presented in all issue types and will be visible even when empty. You cannot delete the default category. You can only rename it.

Edit the category name

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**.

Once you change the shared category scheme, all the modifications will be propagated to all projects associated with this scheme.

Delete the category

1. On the list with categories, locate the one you want to delete.
2. Click **Remove**.
3. When complete, click **Save**.

When you delete the category, all the attachments stored within it will be moved to **Uncategorized** automatically. If you renamed the default category, they will still be put into it.

Manage category visibility per issue types

You can manage the 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.

Manage access restrictions for categories

You can set up access restrictions for categories. While configuring access restrictions, you need to consider which type of 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 that should be hidden from this user.

Set access restrictions for a category

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

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 .

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

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

Manage 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:

1. On the list with categories, locate the one for which you want to configure auto-distribution rules.
2. Click the ![icon] or ![icon] icon. The look of the icon may differ depending on the already configured auto-distribution rule.
3. 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.
4. When complete, click **Save**.
5. Save the category scheme.

Regular expressions allow you to quickly enter the flexible query for matching specific attachments in categories. For example, if you want to proceed only with attachments of ***.docx** or ***.pdf** formats, you need to enter the following regular expression: '**(.+?)(.docx|.pdf)$**'.

> ⓘ Note that the app doesn't consider flags of regular expressions

It means that if you can't use any of the following flags when creating a regular expression for the app:

- g : matches the pattern multiple times
- i : makes the regex case insensitive
- m : enables multi-line mode
- u : enables support for unicode
- s : causes the . to also match new line characters

However, you can rewrite RegExp without flags to satisfy your needs.

> ⓘ Note that the app doesn't consider incoming mail attachments. The attachments received with an Email Handler don't go through auto-distribution