

# Screens and Notification(Optional)



## Recommendations

To have better user experience brought to you by Parallel Approval Process (**PAP**), please refer to the following suggested configurations.

## Set Fields as mandatory

**Approver** field should be set as mandatory when using Parallel Approval Processn (**PAP**) add-on. When user creating a JIRA issue, the user can select approver(s) and submit the issue to selected approver(s) for further actions.

From **Issue > field configuration**, set '**Approver**' as mandatory.



Approver can be managed by using project role to avoid manual selection.

## Configure screens

User can change members in the Approver list in the approval process when necessary. And user has the capability to check whether an approver has executed expected actions or not.

1. From **Issues > Screen**, add **Create issue/ Edit Issue screen** for **PAP** add-on with below fields to be added:

- Summary
- Poriorty
- Description
- Approver
- Attachement
- *Other fields can be added if necessary*

2. From **Issues > Screen**, add **View Screen** for **PAP** add-on with below fields to be added:

- Summary
- Description
- Approver

- Approved By
  - Attachement
3. From **Issues > Screen schemes**, choose '**associate an issue operation with a screen**'.
    - Associate **Create Issue** operation with **Create Issue /Edit issue screen**
    - Associate **Edit Issue** operation with **Create Issue /Edit issue screen**
    - Associate **View Issue** operation with **View issue screen**
  4. From **Issues > Screen**, add **Approval feedback screen** which is used to record feedback provided during approval process. This screen can have no fields configured.

## Configure email notification

To inform approver about the requests, we highly recommend dedicated events and notification scheme to be configured for **PAP** add-on.

1. From **System > Events**, add new event

Event name: **Waiting For Approve** (*Can be customized as required*)

Email Template: **Issue Created** (*Can be customized as required*)

**Add New Event**

Add a new event with a description and a default email template.

Name

Waiting For Approve

Description

Template

Issue Updated

Select the default email template for this event.

Add

2. From **Issues > Notification schemes**, add new email notification schemes and set '**User custom field value**' as '**Approver**' for the '**Waiting For Approve**' event.

Add Notification

Notification Scheme: Default Notification Scheme

Please select the type of Notification you wish to add to scheme:

Events

Issue Created

Issue Updated

Issue Assigned

Issue Resolved

Issue Closed

Issue Commented

Issue Comment Edited

(Select the notifications that you want to assign)

☐ Current Assignee

☐ Reporter

☐ Current User

☐ Project Lead

☐ Component Lead

☐ Single User

☐ Group

☐ Project Role

☐ Single Email Address

☐ All Watchers

☒ User Custom Field Value

☐ Group Custom Field Value

Start typing to get a list of possible matches.

Choose a group

Choose a project role

Notifications will be sent **only** for public issues. Public issue 'Browse Projects' permission to 'Anyone'(any non-logged-in)

Approver

Choose a custom field

Add

Cancel



Don't forget to associate above schemes with **PAP** projects in JIRA.