

Categories

Work Like Tomorrow.™

KOFAX

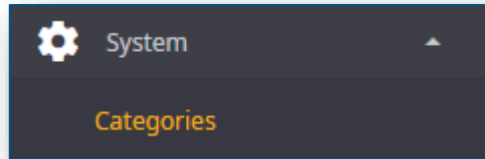
Categories



- Repository for TotalAgility objects e.g.
 - Processes, Resources, Business Rules etc
- Can create new categories to Organise objects
- Default, System, and TotalAgility Forms categories are installed by default
- Can create Sub categories
- Access permissions can be set on categories
- Can't delete a category if there is an object within it
- Categories can be imported/exported as part of a package

Create a Category

- From the **Main** menu navigate to **System > Categories** and click **New**



New category *

* indicates a required field

Name*

Parent category

Description

Category access [Add](#)

Access Permissions

- Resource Access permissions can be set on categories
- By default Designers, Administrator, and Device Users Groups have access to out of box categories
- Categories are hidden if you do not have access to the category

The screenshot shows a web-based 'Edit category' dialog box. At the top left is the title 'Edit category'. At the top right is a red asterisk with the text '* indicates a required field'. Below the title are three main sections: 'Name' with a text input field containing 'Default Category'; 'Description' with a larger text area containing 'Default Category'; and 'Category access' with a list of groups. The 'Category access' section has an 'Add' link on the right. The list of groups includes 'Designers (Group) x', 'Device Users (Group) x', and 'Administrators (Group) x'. At the bottom right are 'Cancel' and 'Save' buttons.

Edit category

* indicates a required field

Name

Description

Category access [Add](#)

Designers (Group) x Device Users (Group) x Administrators (Group) x

Cancel Save

Working Category



- You can set a working category for a resource
- As a Designer you may wish to default to a specific category for a specific project
- New processes will automatically be added to the Working Category
- The List page will default to the Working Category
- The working category can be set by opening a resource (covered in a later module) and assigning a category as their working category