

Manage Categories

Jenny Kongkalai - 2023-12-06 - Manage Content

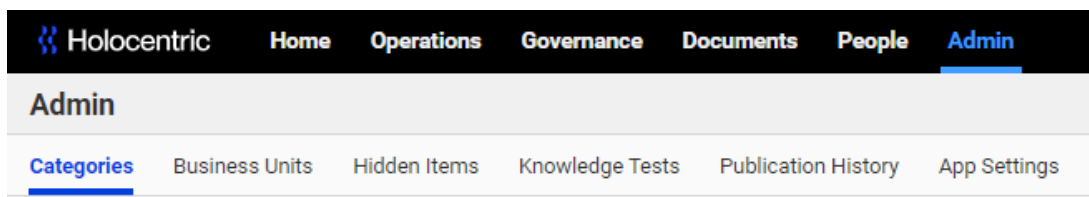
[Manage Categories](#)

To manage categories, a user must have one of the following permissions in Holocentric Connect:

- Model Administration
- Administration

Categories are used to group or classify items. When browsing, categorised items are grouped together. Lists of items can be sorted or filtered by their category. Create and edit categories here.

1. Go to **Admin** then select **Categories**



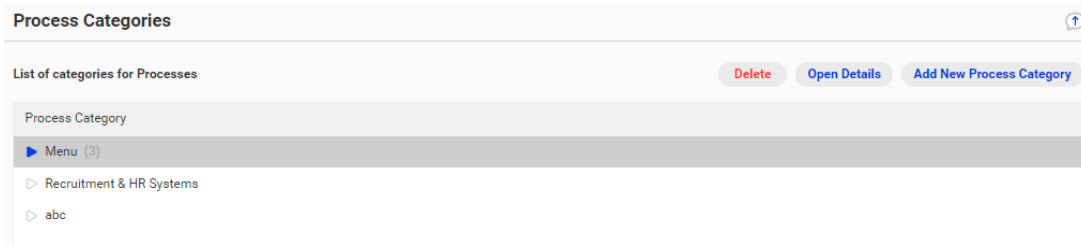
**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

2. Select the relevant content type then click **Edit**



**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

3. Click **Add New Category**



4. Complete the relevant fields and click **Save**

The screenshot shows the 'Add a new Process Category' form. It has three main fields: 'Category name' with the value 'Human Resources', 'Description' with the value 'Processes for Human Resources Management', and 'Category is contained in' with the placeholder text 'move this category so that it is contained within another category'. To the right of the form are two buttons: 'Cancel' and 'Save'. A 'Move to' button is located below the 'Category is contained in' field.

5. If the category belongs to a parent category. It can be added in the **Category is contained in** field

This screenshot is identical to the previous one, but the 'Category is contained in' field and its 'Move to' button are highlighted with a red rectangular border to indicate the next step in the process.

6. Select the parent category then click **Select**

The screenshot shows the 'Select a Process Category' dialog. It features a search bar at the top with the placeholder text 'filter process category names to text entered here'. Below the search bar, there is a list of process categories, each with a small grid icon to its left. The categories listed are 'abc', 'Menu (3)', and 'Recruitment & HR Systems'. The 'Recruitment & HR Systems' category is currently selected and highlighted with a grey background.

7. Use the left and right arrows to turn the selected category into a subcategory.

Process Categories



List of categories for Processes

Delete

Open Details

Add New Process Category

Process Category

▶ Menu (3)

▼ Recruitment & HR Systems (1)

↳ Human Resources

▷ abc

Move:    