

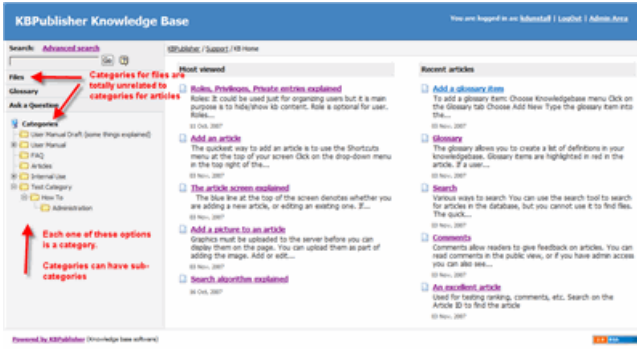
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## Categories

# What are categories?

Categories control where information is displayed, how it is displayed and who can see it.

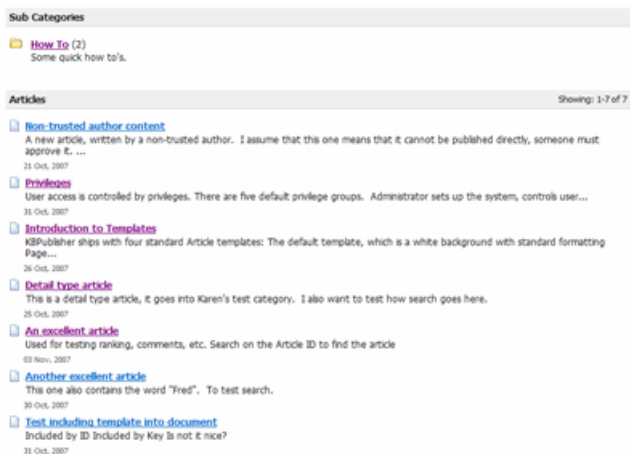


They control the menu display (sometimes known as the table of contents) on the left hand side of the screen.

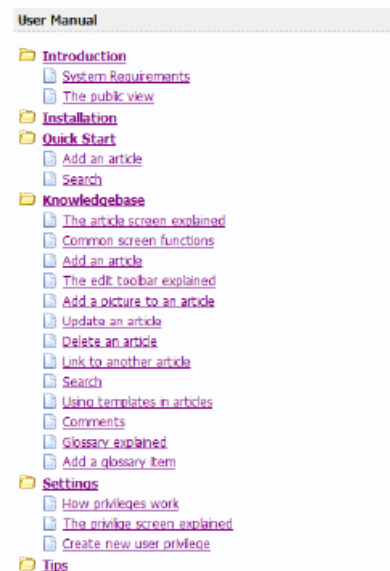
Categories for articles and files are controlled separately.

**Category type** controls how articles in this category are displayed in the public view. There are four category types:

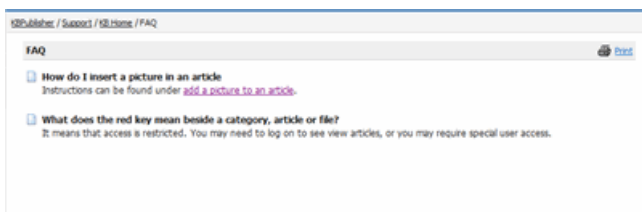
- The **Standard** (default) type displays a list of articles, along with one or two lines of text. If the category has sub-categories, these are displayed above the list.



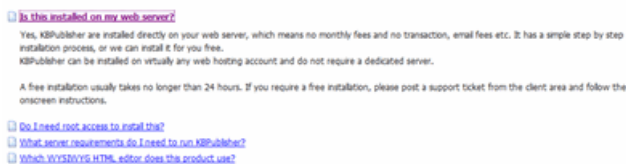
- The **book** type displays items as a table of contents.



- The **Quick FAQ** type displays all articles in the category on the same page.



- While the **Quick FAQ (interactive)** type displays all articles in the category on the same page as well, but with only the titles displayed initially. Click on the title to display the article, click on it again to hide it.



## Add a Category

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The quickest way to add a category is to use the **Shortcuts** menu at the top of your screen.

- Click on the drop-down menu in the top right of the screen and choose **Add new category**.

Or you can do it via the **Categories** tab in the Admin Area

- Click on the **Articles** menu
- Choose the **Categories** tab
- Click on **Add New**.

You can also add a category while you are in the middle of adding an article or a file

- Edit the article or file
- Click on the assign categories button (+)
- Click on **Add New Category**.

Once you are on the category screen you must complete the following sections:

- Add a **Title**. This is the name that will be displayed on the left menu or in any table of contents.
- Define where it fits in the category hierarchy by choosing a **Parent category** and an **Order**. If you don't change these you will add a new top-level category and it will be placed last.

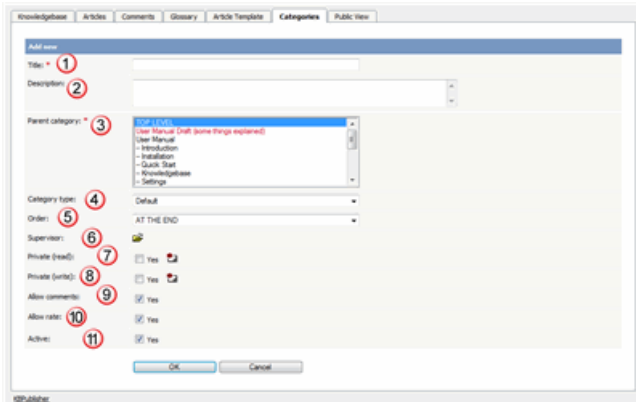
You may also:

- Change how articles are displayed by specifying a category **type**
- Control read and write access through **Private** and **Active**
- **Allow** users to **comment** on or **rate** articles in the category
- Assign a person to approve articles (**Supervisor**) for the category

You can find out more about each of these fields and how they work in [the Category screen explained](#).

## The Category Input Screen Explained

To get to the Category screen, click on the **Articles** menu, then choose the **Categories** tab and then select or edit a category.



1. The category **Title** is the title that is displayed on the left menu in the public view. Title is compulsory.
2. The **Description** is an explanation of what this category is.
3. The **Parent category** denotes where this category will come in the menu. A **TOP LEVEL** category means that this is a top level menu and will be displayed in the list when a user first enters the public view. Categories that are red denote restricted privileges. They may be marked as 'private', or only users with assigned roles can access them.
4. **Category type** controls how articles in this category are displayed in the public view. See detailed explanation [here](#).
5. The **Order** defines where the category is placed in the list of categories. By default, it is added to the end of the list.
6. You can assign an owner to a category by assigning it a **supervisor**. This is the person who receives emails when pending articles have been created and need to be approved.
  - Click on the folder icon to bring up a list of users.
  - **Assign** a user.
7. You can force users to log on to read articles in this category by marking the category **Private Read/Write**. You can restrict authoring of articles in a category by marking the category **Private Write**.

Checking either option for Private brings up a list of roles. Select the role(s) that you wish to allow to read/write. Hold the key to select second and further roles.

If the category is a sub-category, you can inherit the read privacy from the parent category by clicking on **copy from parent category**. This means that if you change the privacy for the parent category the change will flow on to this sub-category.
8. When **Allow comments** is checked, users can add comments to articles in this category.
9. When **Allow rate** is checked, users can add a rating to an article in this category.
10. Content in an **Active** category is published at Public Area. Content that is not active will be hidden, and the only way you can see it through the Admin screens.

You can use this field to deactivate obsolete content, but you can also use this field to hide articles until you are ready to display them. It might be useful, for example, if your knowledgebase is about a system. You decide to add new functionality to the system but don't want the readers to anything about it until the release date. You can create articles about the new functionality in an inactive category, and then after the release, make the category active.

