



Authoring Categories

Process Orchestrator processes, tasks and several other elements of the functional model can be placed into categories. Categories in Process Orchestrator work just like Microsoft Outlook categories with respect to tagging objects for grouping in the UI. Objects such as processes can be in multiple categories. For example, a process can be both a network best practice and a security best practice.

The Categories feature provides a way to organize your processes based on your organizational or functional requirements. Cisco Process Orchestrator ships with predefined categories but provides the functionality for you to create your own business-specific categories. When creating a process, you can assign the process to a category. You can also add other categories to a category to create a hierarchy.

The following sections provide information about working with categories:

- [Creating Categories](#)
- [Adding Objects to a Category](#)
- [Viewing Process Properties from the Members Tab](#)

Creating Categories

Categories can be used to organize your processes based on your business-specific requirements. Use the **Definitions > Categories** view to create a new category and add members to the category. You can also add members to a category when defining a process.

For additional information about defining a process, see [Chapter 5, “Authoring Processes.”](#)

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- Step 1** Choose **Definitions > Categories**, right-click and choose **New > Category**.
- Step 2** In the **New Category Properties** property sheet, update the properties for this category, then click **OK**.
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See also

[Adding Objects to a Category](#)

[Viewing Process Properties from the Members Tab](#)

Adding Objects to a Category

You can choose the objects (or create new objects) to be included as members of a category. Both processes and categories can be included as members of a category.

**Note**

The category membership of a locked process cannot be edited by other users. For more information about locked processes, see [Creating Processes as a Team](#).

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- Step 1** Choose **Definitions > Categories**, select a category, right-click and choose **Properties**.
 - Step 2** Click the **Members** tab, then click **Add**.
 - Step 3** In the Objects available for category membership dialog box, use one of the following methods to select objects:
 - If the appropriate objects are listed under Select Category Members, choose the appropriate categories or processes to be included in the category, and click **OK**.
 - If the appropriate objects are not listed, click one of the following to create a new object, and click **OK**:
 - **New > Categories**—Define the properties of a new category
 - **New > Processes**—Define the properties of a new process.The new object displays in the Select Category Members list. Highlight the new object and any other objects, as necessary. The selected items display on the Members tab.
 - Step 4** Click **OK** to close the dialog box and complete the procedure.
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Viewing Process Properties from the Members Tab

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- Step 1** Choose **Definitions > Categories**, select a category, right-click and choose **Properties**.
 - Step 2** Click the **Members** tab. The processes and categories in the selected category are displayed.
 - Step 3** To view the properties for a process or category in that list, select the object, right-click, and choose **Properties**.
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