



## **Categories window**

OnCommand Workflow Automation 5.1

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# Table of Contents

- Categories window ..... 1
  - Categories table ..... 1
  - Toolbar ..... 2
  - New Category dialog box ..... 3
  - Edit Category dialog box ..... 4
  - Clone Category dialog box ..... 5

# Categories window

The Categories window enables you to manage the workflow categories.



Depending on your role and account privileges, this window might not be displayed.

- Categories table
- Toolbar

A category is a set of workflows that enables you to complete a task. You can create a category by grouping a set of related workflows. You can also grant access to specific users to operate a category.

## Categories table

The Categories table lists the workflow categories. The categories are identified by one of the following:

- - content created by users
- - content developed by Professional Services (PS), which is available only on custom installations made by PS
- - packs developed by users
- - content created by users that is locked
- - NetApp-certified content

You can customize the table display by using the filtering and sorting features available for each column, as well as by rearranging the column order.

- enables or disables filtering for the entire table. A red "x" appears over the icon if filtering is disabled.
- Double-clicking clears and resets the filtering selections.
- on each column header enables you to filter based on the content of the columns. Clicking in a column allows you to filter on a specific item from the drop-down list or on all available items.
- Clicking the column header toggles between ascending and descending order of sorting. You can identify the applied sort order by the sort arrows ( for ascending and for descending).
- To rearrange the location of columns, you can drag and drop columns to place them in any required order. However, you cannot hide or delete any of these columns.
- Clicking the **Search** filter text box allows you to search for specific content. In addition, you can search using supported operators for the applicable column type, Alphabetic or Numeric.

The Categories table contains the following columns:

- **Certification**

Indicates whether the category is user-created () , PS () , community () , user-locked () , or NetApp-certified () .

- **Name**

Displays the name of the category.

- **Description**

Displays a description of the category.

- **Workflows**

Displays the workflows that are available in the category.

- **Used for workflow authorization**

- Displays “true” for the categories that are restricted to certain users with operator role.
- Displays “false” for the categories that are available for all users with operator role.

- **Users**

Displays the name of the user with approver or operator role who is authorized to execute the category.

- **Active Directory Group**

Indicates the name of the Active Directory group who is authorized to execute the category.

You can search for a group by entering the group name in the **Search** filter text box.

- **Last Updated On**

Displays the date and time when the category was last updated.

- **Updated By**

Displays the name of the user who updated the category.

## Toolbar

The toolbar is located above the column header. You can use the icons in the toolbar to perform various actions. These actions can also be accessed from the right-click menu in the window.

-  **(New)**

Opens the New Category dialog box, which enables you to create a new category.

-  **(Edit)**

Opens the Category <category\_name> dialog box, which enables you to edit the selected category. You can also double-click the category to open the Category <category\_name> dialog box.

-  **(Clone)**

Opens the New Category <category\_name> - copy dialog box, which enables you to create a clone or copy of the selected category.

-  **(Delete)**

Opens the Delete Category confirmation dialog box, which enables you to delete the selected category.

-  **(Export)**

Enables you to export the selected category.

-  **(Add To Pack)**

Opens the Add To Pack Categories dialog box, which enables you to add the category and its dependable entities to a pack, which is editable.



The Add To Pack feature is enabled only for categories for which the certification is set to **None**.

-  **(Remove From Pack)**

Opens the Remove From Pack Categories dialog box for the selected category, which enables you to delete or remove the category from the pack.



The Remove From Pack feature is enabled only for categories for which the certification is set to **None**.

## New Category dialog box

The New Category dialog box enables you to create a new workflow category.

- **Name**

Enables you to enter a name for the category. You must enter a name to save the category.

- **Description**

Enables you to enter a description for the category.

- **Available Workflows**

Displays all the available workflows that are not moved to the **Selected Workflows** box.

- **Selected Workflows**

Displays all the workflows that are selected for the category.

- **Category Used for Workflow Authorization**

Enables you to select users with operator role who can execute the category. By default, the check box is not selected and the category is available for all users.

- **Restrict access to workflows in this category to the following users and Active Directory groups**

Enables you to restrict access to workflows in the selected category to selected users and Active Directory groups.

- **Available Approvers and Operators**

Displays all users with approver and operator roles.

- **Selected Approvers and Operators**

Displays the users who are allowed to execute the category.

- **Available Approver and Operator Groups**

Displays all groups with approver and operator roles.

- **Selected Approver and Operator Groups**

Displays the groups that are allowed to execute the category.

## Command buttons

- **Selection buttons**

Enables you to move the selected entry from one box to another.

- **Save**

Saves the category and closes the dialog box.

- **Cancel**

Does not save the category and closes the dialog box.

## Edit Category dialog box

The Edit Category dialog box enables you to edit a workflow category.

- **Name**

Enables you to edit the name of the category.

- **Description**

Enables you to edit the description for the category.

- **Available Workflows**

Displays all the available workflows that are not moved to the Selected Workflows box.

- **Selected Workflows**

Displays all the workflows that are selected for the category.

- **Category Used for Workflow Authorization**

Enables you to grant access to users with operator role to execute the category. The check box is not selected by default.

- **Available Operators**

Displays all the users with operator role who do not have access to the category.

- **Selected Operators**

Displays the users who are granted access to the category.

## Command buttons

- **Selection buttons**

Moves the selected entry from one box to another.

- **Save**

Saves the category and closes the dialog box.

- **Cancel**

Does not save the category and closes the dialog box.

## Clone Category dialog box

The Clone Category dialog box enables you to copy a workflow category and edit the category.

- **Name**

Enables you to edit the name for the category. The name of the category you have selected to clone is used as the name for the clone and appended with - copy by default.

- **Description**

Enables you to enter a description for the category.

- **Available Workflows**

Displays all the available workflows that are not moved to the Selected Workflows box.

- **Selected Workflows**

Displays all the workflows you have selected for the category.

- **Category Used for Workflow Authorization**

Enables you to select users with operator role who can execute the category. By default, the check box is not selected and the category is available for all users.

- **Available Operators**

Displays all the users with operator role.

- **Selected Operators**

Displays the users who are allowed to execute the category.

## Command buttons

- **Selection buttons**

Enables you to move the selected entry from one box to another.

- **Save**

Saves the category and closes the dialog box.

- **Cancel**

Does not save the category and closes the dialog box.



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