Category User Guide

Category Actions

Add Category

Allows either a singular Category to be created or can create multiple Categories at once.

When this action starts a form is displayed to enter the the name of the Category and where it should be added in the Category tree.

If the "Add Multiple Categories" box is checked multiple Categories can be added at once by using tab characters to signify their places in the tree.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Edit

To start this action, select the Category you need to work on, and click the ✏ button on that row.

Edits an existing Category.

When this action starts a form is displayed with the existing Category and any previous information entered.

Each field customises or controls some aspect of the Category display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Delete

To start this action, either select the Category to work on and click the 🗑 button on that row. Or CTRL+click to select multiple Categories and click the 🗑 button above the Category listing.

Deletes an existing Category.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Category.

Search

To start this action, click the 🔍 button above the Category listing.

Allows a Search of Categories.

This allows a simple text search across all Categories.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Category listing in the ⋮ More Menu.

Allows an Advanced Search of Categories.

The Advanced Search opens a new section at the bottom of the Categories and allows several distinct features:

- Multiple Search Lines : allows Category matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Category listing in the ⋮ More Menu.

Refresh the list of Categories.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Category listing in the ⋮ More Menu.

Export the Category results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Categories shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Categories will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Category listing in the ⋮ More Menu.

Export all the Categories to a List.

Exactly as for "Export to List" except rather than just Exporting the Category results shown, all Categories will be expored.

Export Item

To start this action, select the Category you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Category to a List.

Exactly as for "Export to List" except rather than just Exporting the Category results shown, only the selected Category is exported.

Category Field Reference

Default Page

Select a page containing the main content items for this category

Related Categories

Select the categories may be shown as related categories when another category or content item is displayed

Category Tags

Select the filters applicable to this category. These may be used to include the category in a subset of categories to be listed in a content listing page item

Designer Asset

If set the category is hidden from the Content Managers when 'Display Designer Assets' is turned off for the site

Crawlable

Set to "Yes" if you want this image to be crawled by search engines.

Set to "No" if you want to prevent this image from being crawled by search engines.

Set to "Default" to use site default setting.

Aliases

A list of aliases (one per line) for this category name.

This list will be used by LDI Category Trees to provide additional links to the same category.

This may be used for the technical and common name of the same thing, E.g. 'Humerus' and 'Funny Bone'.