# HP Propel

Software Version: 2.01

## Categories Help

Document Release Date: September 2015
Software Release Date: September 2015

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# Contents

# Categories

## Concepts

An HP Propel catalog contains published catalog items for consumer fulfillment in the HP Propel Portal.

Categories are used to group catalog items within an catalog. The HP Propel administrator uses the **Categories** application to manage categories.

## Tasks

Available tasks:

- "View Category Details" below

- "Create Category" on the next page

- "Edit Category Details" on page 6

- "Delete Category" on page 7 – You cannot delete a category that has any catalog items assigned.

# View Category Details

## Concepts

Categories are used to group catalog items within an aggregation in HP Propel.

## Tasks

To view the details of a category:

1. From the Launchpad in HP Propel, click the **Categories** application. The **Categories** view is displayed.

2. **Search Categories** – To search the list of categories that are displayed, type the search criteria. Only the categories that meet the search criteria are displayed.

3. View **Categories** in an aggregation – To quickly view all of the categories that are in an aggregation, expand the plus icon ⊕ (left area). This is useful to identify unnecessary categories, such as duplicate categories due to alphabetic case differences. To view the categories that are nested under a parent category, click the parent category in the aggregation.

4. To view the details of a category, click the category in the main list. The details of the category are displayed, including **Name**, **Description**, and **Parent Category** properties.

### Related Tasks

- "Create Category" below – Instructions to create a new category.

- "Edit Category Details" on the next page – Instructions to edit a category's properties.

- "Delete Category" on page 7 – Instructions to to delete a category.

# Create Category

## Concepts

Categories are used to group catalog items within a catalog in HP Propel.

The HP Propel administrator can create new categories in HP Propel.

## Tasks

To create a new category:

1. From the Launchpad in HP Propel, click the **Categories** application. The **Categories** view is displayed.

2. Click **Create Category**. The **New Category** dialog is displayed.

3. Fill in and select the necessary fields in the **New Category** dialog:

a. Type the **Name** of the new category .

b. Type the **Description** of the new category.

c. Select the **Parent Category** for the new category. Note that aggregations are in the **Parent Category** list, and this is how a category is added to an aggregation.

4. Click **Create Category** in the **New Category** dialog to finish and save your changes.

The new category and its properties are displayed. To view the new category in its parent category, see "View Category Details" on page 4.

## Related Tasks

- "View Category Details" on page 4 – Instructions to view a category's properties.

- "Edit Category Details" below – Instructions to edit a category's properties.

- "Delete Category" on the next page – Instructions to to delete a category.

# Edit Category Details

## Concepts

Categories are used to group catalog items within a catalog in HP Propel.

The HP Propel administrator can edit the properties of a category, including **Name**, **Description**, **Parent Category**, and **Main Image** fields.

## Tasks

To revise a category's properties:

1. From the Launchpad in HP Propel, click the **Categories** application. The **Categories** view is displayed.

2. Click the category that you want to edit. The details of the category are displayed, including **Name**, **Description**, **Parent Category**, and **Main Image** properties.

3. Click **Edit**. The **Details** dialog is displayed.

4. Type or select new values for the **Name**, **Description**, **Parent Category**, and **Main Image** properties that you want revised in the category.

5. Click **Save** in the **Details** dialog to finish and save your changes.

The revisions for the category's properties are displayed.

## Related Tasks

- "Create Category" on page 5 – Instructions to create a new category.

- "View Category Details" on page 4 – Instructions to view a category's properties.

- "Delete Category" below – Instructions to to delete a category.

# Delete Category

## Concepts

Categories are used to group catalog items within a catalog in HP Propel.

The HP Propel administrator can delete categories in HP Propel.

## Tasks

To delete a category:

1. From the Launchpad in HP Propel, click the **Categories** application. The **Categories** view is displayed.

2. In the **Categories** view, for the category you want to delete, click ⋮ and select **Remove**. A confirmation dialog to delete the category is displayed.

3. Confirm the category deletion, and the category is deleted from HP Propel.

## Related Tasks

- "View Category Details" on page 4 – Instructions to view a category's properties.

- "Create Category" on page 5 – Instructions to create a new category.

- "Edit Category Details" on the previous page – Instructions to edit a category's properties.

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