Creating and managing categories

Using categories and grouping projects into them, you can organize the structure of your server projects' repository according to your needs.

By default, there is a single category *Uncategorized*, but you can create as many categories as you need. A project can be created directly in a selected category and later easily moved to another one. The category can be created in advance or while adding the project to the server. Categories can be renamed and removed. However, they cannot have sub-categories.



The TWCloud project categories in the modeling tool dialogs will be hidden if user does not have Categorize Resources permission or Read-Only permission to at least one project inside of these categories.

Read the following to learn how

- · To create a single category
- To rename a category
- To move a project to another category
- To remove the category
- To hide empty categories



Categories can also be managed via the Resource application. Learn more about this in Teamwork Cloud User Guide.

To create a single category

- 1. From the Collaborate menu, choose Projects. The Manage Projects dialog opens.
- 2. Be sure the Categorized View is turned on in the dialog. If it is not, click
- 3. Choose one of the following:
 - Click on the toolbar of the open dialog.
 - Right-click anywhere in the project list area and then select Create Category.
 - Press Insert.
- 4. After the Create Category dialog opens, type a category name.
- 5. Click **OK** to confirm the creation.

The category is created. You can find it in the project list ordered alphabetically.

To rename a category

- ${\bf 1.} \ \ {\bf From \ the \ \ Collaborate \ menu, \ choose \ \ \bf Projects. \ The \ \ \bf Manage \ \ Projects \ \ dialogs \ opens.$
- 2. Select a category or a project that belongs to the category you want to rename and then do either:
 - Click on the toolbar of the open dialog
 - Right-click the selection and then select Rename Category.



The Uncategorized category cannot be renamed.

- 3. When the Rename Category dialog opens, type a new category name.
- 4. Click OK.

The category is renamed.

To move a project to another category

- 1. From the Collaborate menu, choose Projects. The Manage Projects dialogs opens.
- 2. Select the project you want to move and do one of the following:
 - Click on the toolbar of the open dialog.

- Right-click the selection and then select Move to Category.
- 3. When the Move to Category dialog opens, select the category to which you want to move the project.
- 4. Click OK.

The project appears in the selected category.

To remove the category

- 1. From the Collaborate menu, choose Projects. The Manage Projects dialogs opens.
- 2. Select the category or the project that belongs to the category you want to remove and then do either:
 - Click on the toolbar of the open dialog.
 - Right-click the selection and then select Remove Category.



The *Uncategorized* category cannot be removed.

3. Click Yes to confirm your decision.

The category is removed from the server repository. As a result, projects from that category are automatically moved to the *Uncategorized* category.

Empty categories are by default shown in the Manage Projects and Open Server Project dialogs, but you can simply hide them.

To hide empty categories

• Click on the toolbar of the open dialog. Click the button once more to show the empty categories again.