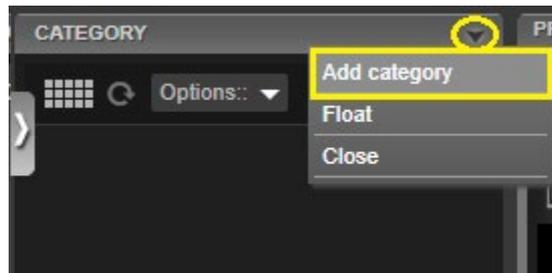


## How to create Categories in the eMAM Director interface?

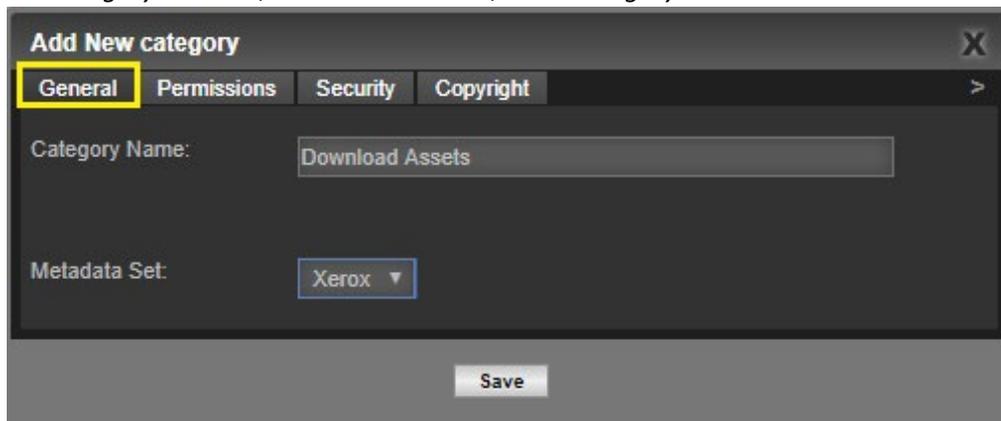
Category widget can be used to organize your assets in the eMAM Director interface. Categories allow administrators or users/groups with permission to organize their assets in a hierarchical fashion. In eMAM, a user is a member of one or more user groups: access to a category of assets is restricted at the user group level. The Categories widget will display all the categories to which a user has access to.

**Add New Category:** To create categories, follow the instructions below:

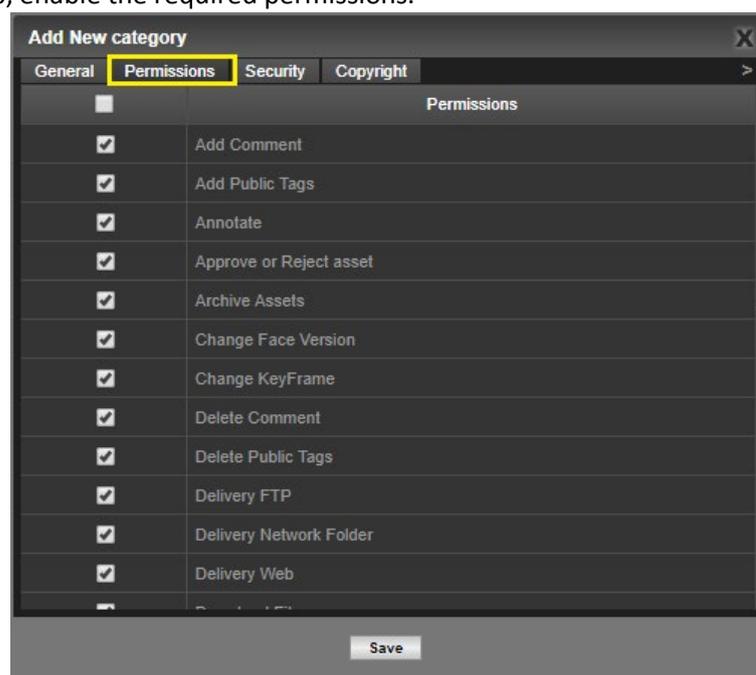
1. In the *Category* widget, click on *Add category* from the widget menu.



2. In the *Add New Category* window, under *General* tab, fill in *Category name* & select a *Metadata Set*.



3. Under *Permissions* tab, enable the required permissions.

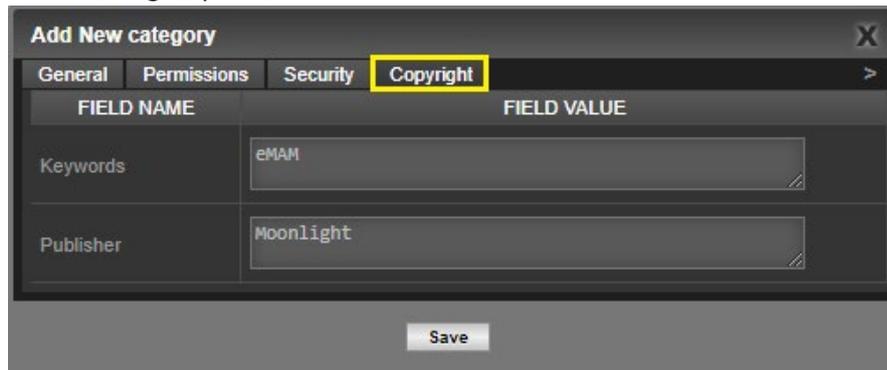


Permissions	
<input checked="" type="checkbox"/>	Add Comment
<input checked="" type="checkbox"/>	Add Public Tags
<input checked="" type="checkbox"/>	Annotate
<input checked="" type="checkbox"/>	Approve or Reject asset
<input checked="" type="checkbox"/>	Archive Assets
<input checked="" type="checkbox"/>	Change Face Version
<input checked="" type="checkbox"/>	Change KeyFrame
<input checked="" type="checkbox"/>	Delete Comment
<input checked="" type="checkbox"/>	Delete Public Tags
<input checked="" type="checkbox"/>	Delivery FTP
<input checked="" type="checkbox"/>	Delivery Network Folder
<input checked="" type="checkbox"/>	Delivery Web

4. Under *Security* tab, assign to required *User Groups*.

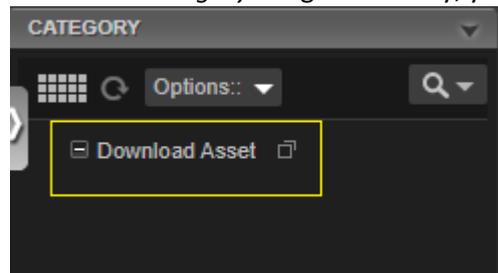


5. Under the custom metadata group tab, enter the metadata fields.

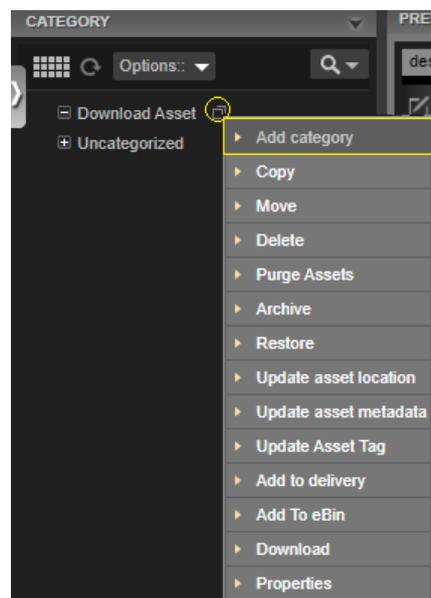


6. Click on **Save** button.

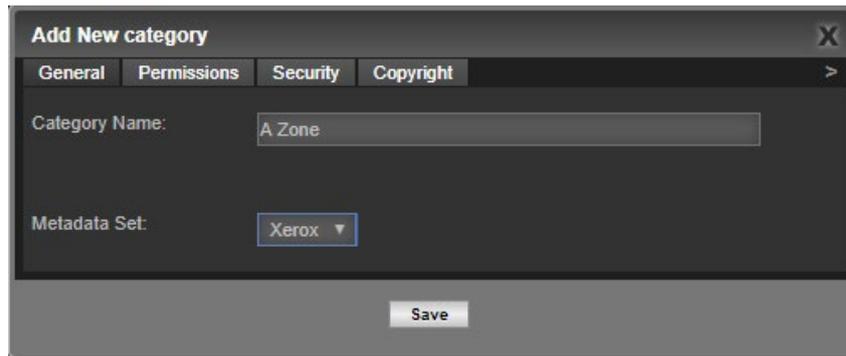
7. New created category gets added under the *Category* widget. Similarly, you can create multiple categories.



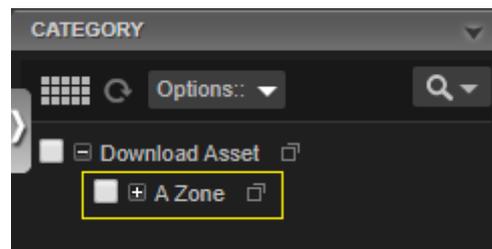
8. To create a subcategory, click on the menu icon displayed adjacent to the category name. Click on *Add category*.



9. In the *Add New Category* window, fill in the details under each tab (as mentioned in the above *Add Category* steps).

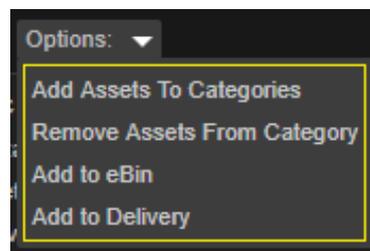


10. Newly added subcategory gets displayed under the main category. Similarly, any no. of sub categories can be created under a category.



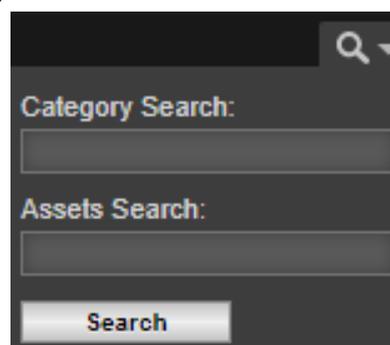
### Features under Category widget

1. **Options:** Options provide few multi asset functions to perform bulk operations for selected assets under a Category.

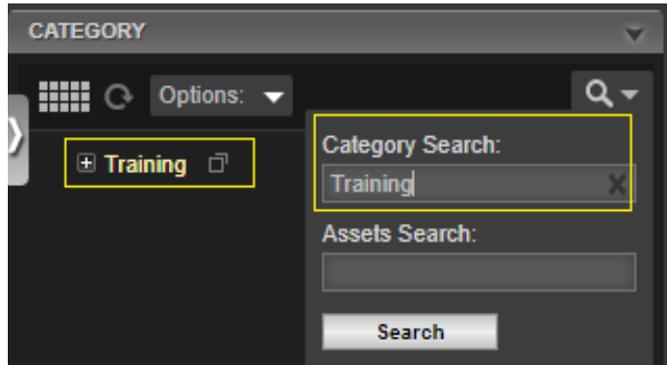


- ✓ **Add Assets to Categories:** Assets under one category can be either copied or moved to another category.
- ✓ **Remove Assets from Category:** Removes the selected assets from the Category.
- ✓ **Add assets to eBIN:** Adds the selected assets under the category to eBIN basket.
- ✓ **Add to Delivery:** Adds the selected assets to the Delivery widget.

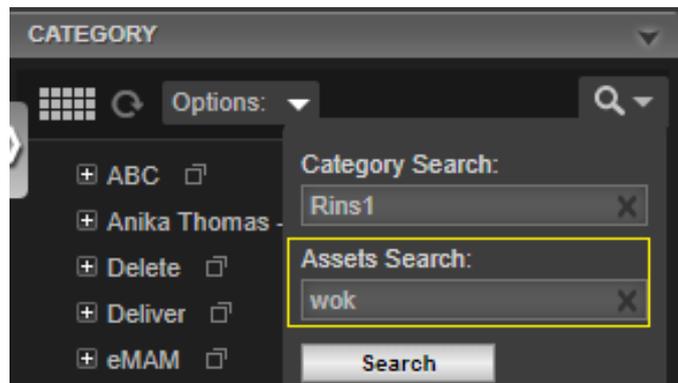
2. **Search** : Using this option you can search for category and assets under Category widget. Enter the search phrase and click on *Search* button.



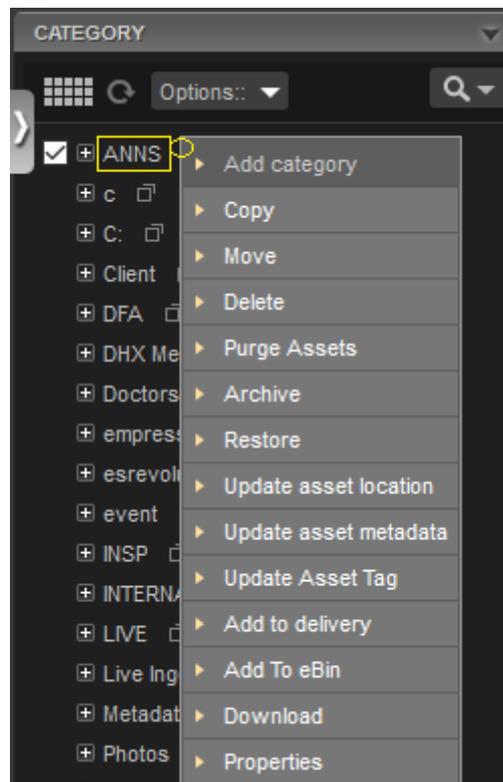
- ✓ **Category search:** Just key in the category name you are looking for (*list of suggestions gets auto populated*) click on *Search* button.



- ✓ **Assets search:** After entering a category name, just key in the asset name you are looking for (*list of suggestions gets auto populated*) and click on *Search* button.



- Category Menu functions:** Category widget also has pulldown menu options next to each category to add a category (subcategory), edit a category, copy, move, delete, archive, restore, add to the eBin, add to the delivery queue or display properties.



- ✓ **Add category:** Add category option creates new sub/child category under an existing category.
- ✓ **Copy:** Copy function creates a copy of the category in the “clipboard” so it can be pasted into another category or new category. This does not duplicate an asset, it only creates additional asset pointers.
- ✓ **Move:** "Move" option will move the whole category (*including assets and subcategories*) to another category and the original category gets deleted.
- ✓ **Delete:** Delete option only deletes the category and all its subcategories and not the assets under categories.
- ✓ **Purge Assets:** To purge the assets under a category without deleting the category, select Purge Assets from the category options (*visible only to users with purge permissions*).
- ✓ **Archive:** Archive will send the assets in the selected Category to the pre-set archive destination.
- ✓ **Restore:** This option restores archived assets back to the storage. Progress can be monitored in the Dashboard widget.
- ✓ **Update Asset location:** This option updates asset file location of all assets under Category.
- ✓ **Update Bulk Metadata:** This option can be used to update metadata for bulk assets under a category.
- ✓ **Update Asset Tag:** This option can be used to update tag for bulk assets under a category.
- ✓ **Add to Delivery:** This option will add assets under the selected category to the delivery queue for delivery as per the pre-defined list of delivery options.
- ✓ **Add To eBIN:** This option will add assets in the selected category to the eBIN widget for email and social media delivery – eSend, eShare, eOrder and Download.
- ✓ **Download:** This option downloads all assets in category using DeskLink app which is a cross platform desktop application with browse and download options.
- ✓ **Properties:** This option displays the properties about the selected category and also allows admin or users with “Manage Category” permissions to edit the category details. Properties option can also be used to edit category details like category name, change Metadata set, set permissions and user groups and update custom metadata fields.

## Need Help

Please contact eMAM Support at [support@emamcloud.com](mailto:support@emamcloud.com).