

Manage Workflow Categories

Last Modified on 01/31/2018 2:02 am EST

v8.4 and earlier

Cora SeQuence enables you to organize workflows into categories, which helps you to maintain a neater, more orderly environment. It also helps multiple teams and users to manage their workflows.

Note: When you delete a category, the workflows that were in the categories are not deleted.

Create a Workflow Category

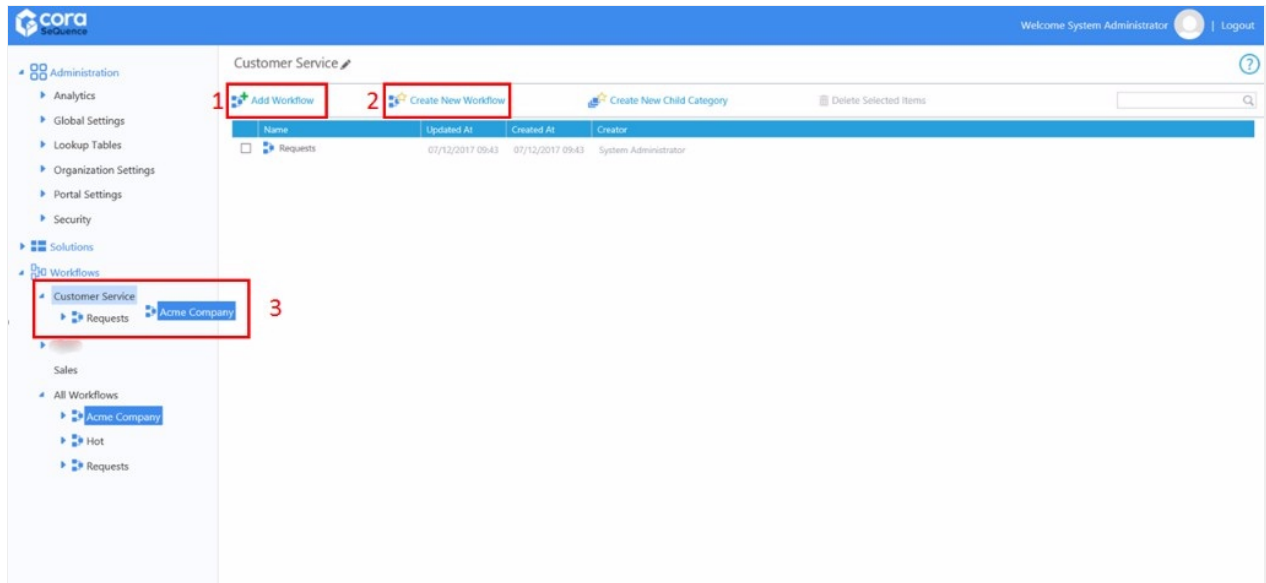
1. In the Administration console, click Workflows.
2. From the action bar in the Workflows area, click **Create New Child Category**.
3. Type a name for the category, and click **Create**.

The screenshot shows the Cora SeQuence Administration console. The left sidebar contains a navigation menu with 'Workflows' highlighted. The main area displays the 'Workflows' page with a table of existing workflows. A modal dialog box is open for creating a new child category, with the name 'Sales' entered and the 'Create' button highlighted.

Name	Updated At	Created At	Creator
Customer Service			
New Child Category - Int...	7/15/09	06/12/2017 15:09	System Administrator
	7/09:35	07/12/2017 09:35	
	7/09:43	07/12/2017 09:43	System Administrator

Add Workflows to a Category

1. From the Workflow tree, click the category.
2. Add workflows to the category using one of the following methods.
 - o Click **Add Workflow**.
 - o Click **Create New Workflow**.
 - o From the Workflows tree, drag-and-drop the workflows to the category.



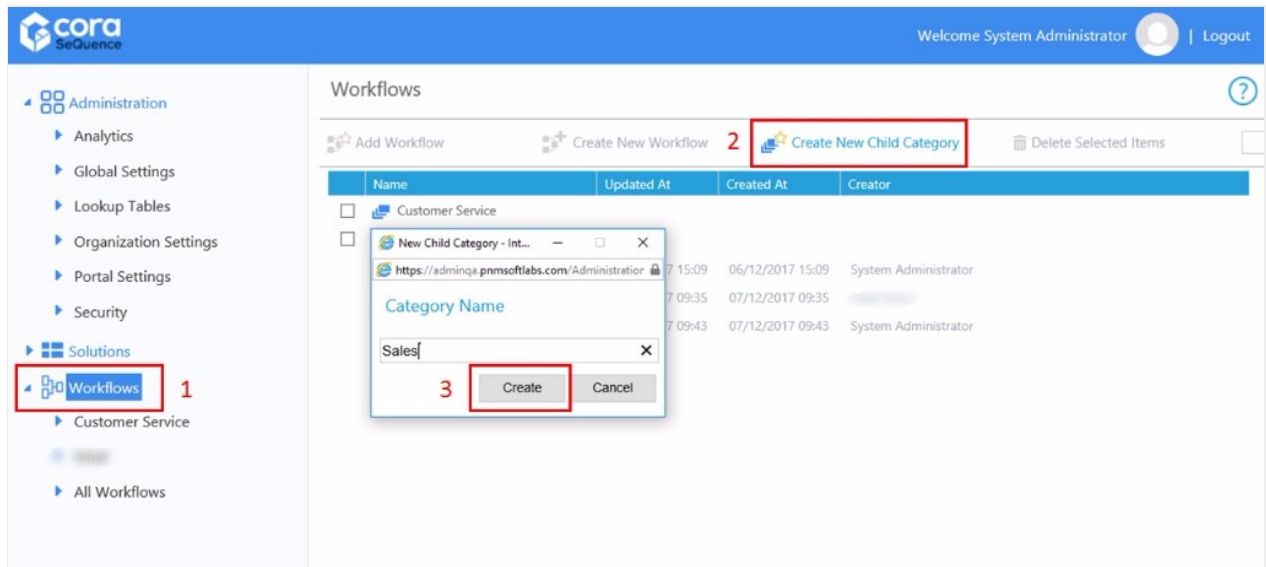
v8.5

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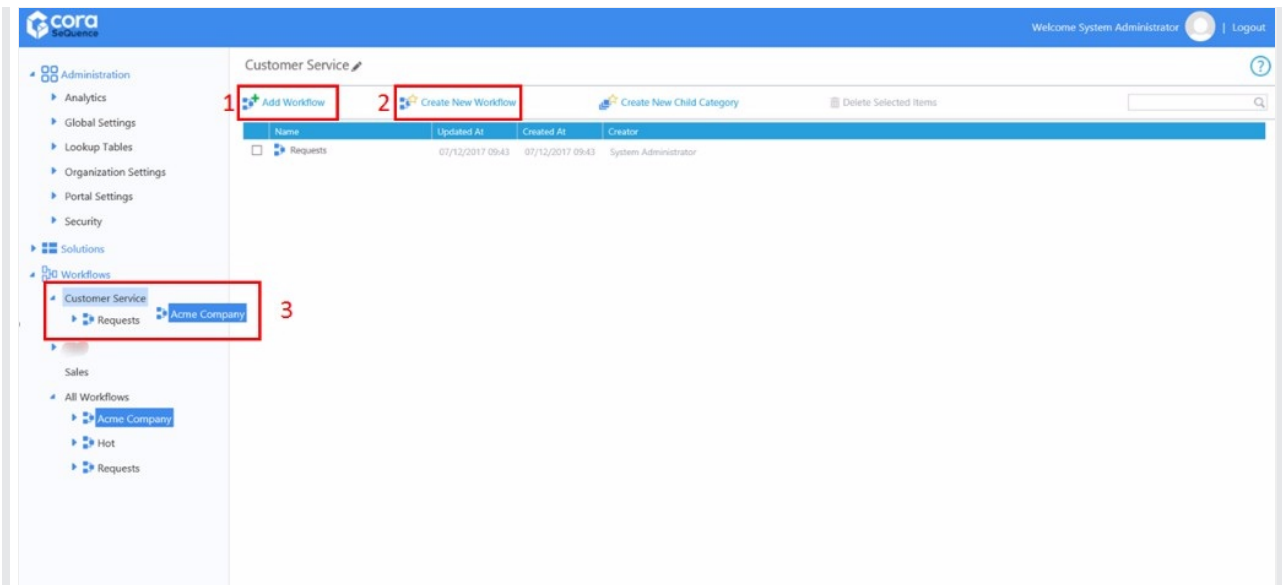
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Add Workflows to a Category

1. From the Workflow tree, click the category.
2. Select the workflows you want to add to the category.
 - o Click **Add Workflow**.
 - o Click **Create New Workflow**.
 - o From the Workflows tree, drag-and-drop the workflows to the category.



Import a Workflow to a Workflow Category

1. Right-click the category you want to add a workflow to.
2. Select **Import Workflow**.
3. Browse for the workflow you want to import, and click **Import**.

