View & Field Categories

Overview

When defining Views administrators will need to make use of a two-tier category structure:

1. View Categories
2. Field Categories

View Categories are used to contain groups of Field Categories, which in turn are used to store and display fields for report writers. When creating a view, you will have to nominate a View Category to use, this will determine what Field Categories are available on the Fields step of the builder. From here you are able to adjust the list of Field Categories, but keep in mind this will adjust the Field Categories for all Views using the selected View Category.

Example Structure

If you have Sales, Product, and HR reporting it is likely that the fields will be different for each of the areas, and as such will require different groupings or Field Categories. In this case an administrator would most likely define a Sales, Product, and HR View Category, and then define a list of Field Categories for each. This structure may look something like this:

- Sales
    - Sales Staff
    - Product Information
    - Invoicing
    - Time
- Product
    - Product Information
    - Stock Levels
    - Time
    - Supplier Information
- HR
    - Staff Information
    - Address
    - Time
    - Salary Information

As you can see, some of the Field Categories are used by multiple View Categories, but each set has been defined to relate to a reporting area.
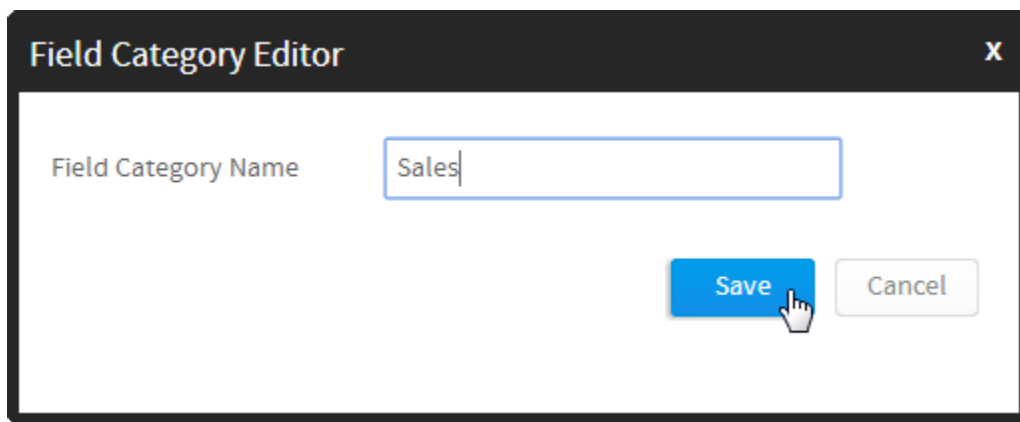
Field Categories

Field Categories are used to display groups of fields defined in the View, for use in the Report Builder. They are purely for display purposes and contain no forms of security like their Content Category counterparts. A list of folders can be found through **Administration** > **Admin Console** > **Field Categories**, where you can Add, Edit, and Delete.

Add Field Category

To add a new folder, click on the **Add** button at the bottom of the Field Categories list in the Admin Console. Here you will need to provide a text label for the folder. Click **Save** to complete.
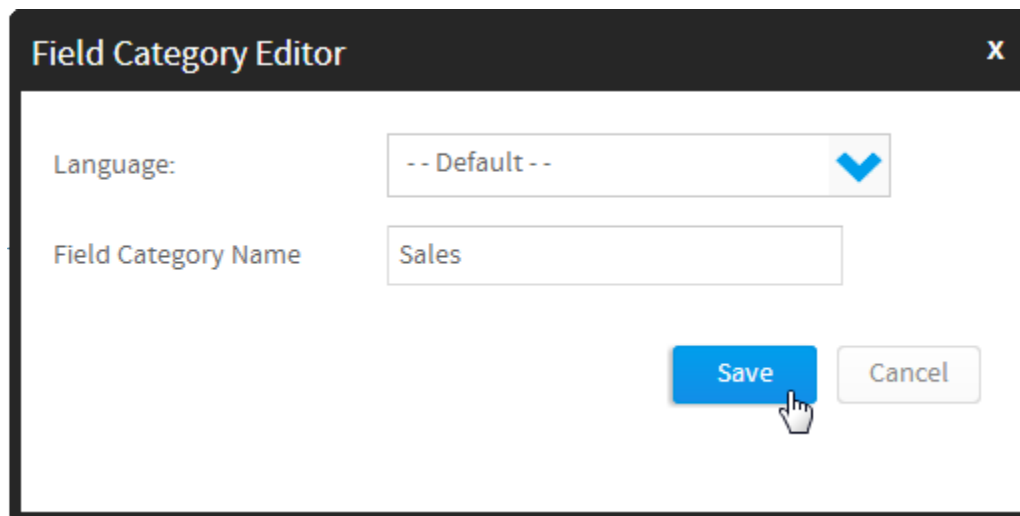
Your new field category will now be available for selection when editing a View Category, or through the View Builder Fields Step.

Edit Field Category

To edit the name of a folder, click on it in the Field Categories list in the Admin Console. Here you will be able to change the text label defined, and also provide translation text for defined languages if you have the Content Translation functionality enabled.
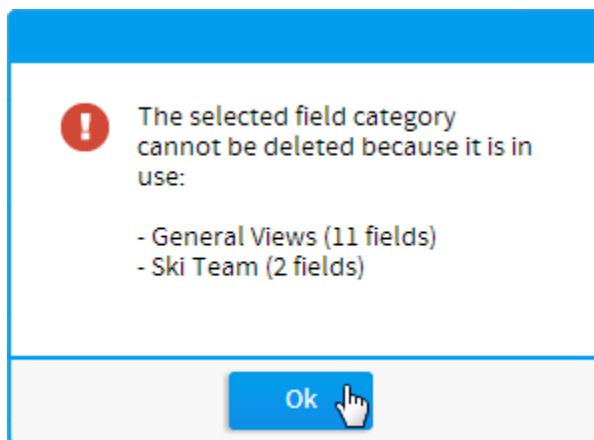
Delete Field Category

To delete a folder, click on the **x** at the end of its row in the Field Categories list in the Admin Console. Here you will be prompted to confirm the deletion. If the folder is currently in use, you will be shown the following prompt informing you of which View Categories currently use the folder, and how many fields are contained in each. You will not be able to delete the category until the fields have been reassigned.
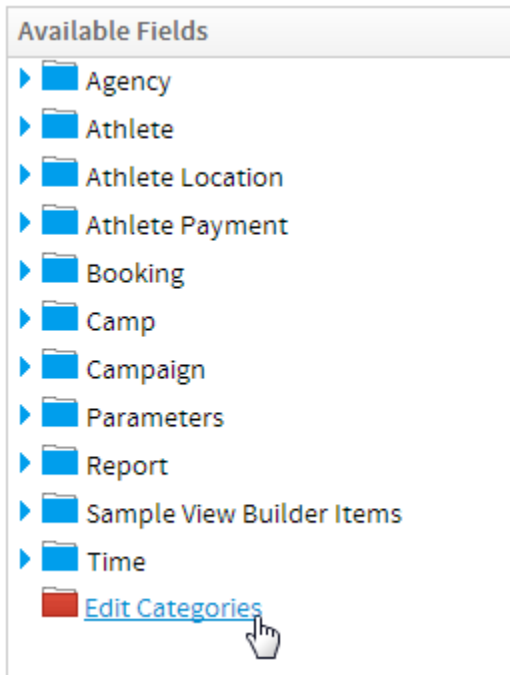

Adjust Field Categories in View

Field Categories can also be adjusted through the View Builder if, during the process of creating or editing a View, an administrator realises they need additional folders. On the View Fields step of the builder, click on the **Edit Categories** option in the main panel.

You will now see a window with all the available field categories. The left list contains folders not in use by the current View Category, the right contains ones that are in use. Administrators can add and remove from the active list, as well as create new folders.
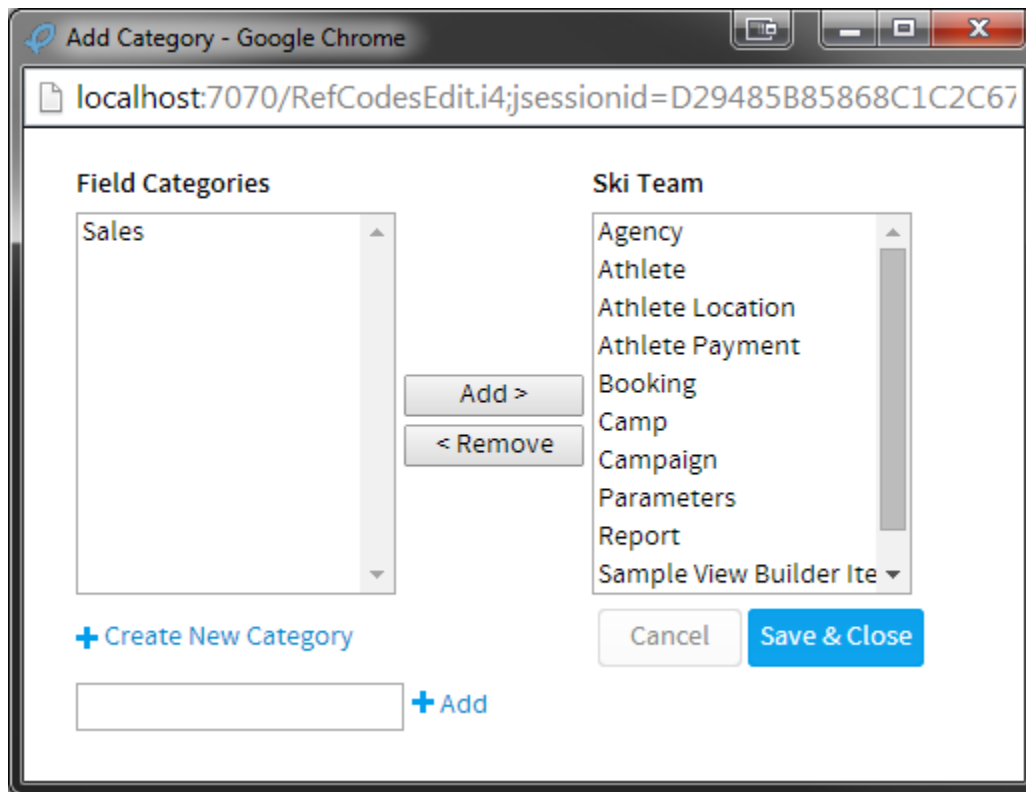
Note: it's important to remember that editing Field Categories through the View Builder does not just adjust the list for the current view, but **all** views currently using the selected View Category.

View Categories

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Add View Category

To add a new folder, click on the **Add** button at the bottom of the View Categories list in the Admin Console. Here you will need to provide a text label for the folder. Click **Save** to complete.

Your new view category will now be available for selection when creating a View, but you will still have to assign Field Categories to it in order to use it.

Assign Field Categories

To assign Field Categories you will need to click on the count next to the View Category name.

You will now have access to a list of Field Categories which you can enable/disable for use in the View Category.

Note: if you try to disable a Field Category in the list which is currently in use, it will revert to being enabled when you save your changes. Fields must be removed from the Field Category before it can be disabled.

Edit View Category

To edit the name of a folder, click on it in the View Categories list in the Admin Console.

Name	Field Categories	
General Views	1	✕
Sales	3	✕
Ski Team	11	✕

Here you will be able to change the text label defined, and also provide translation text for defined languages if you have the Content Translation functionality enabled.

Delete View Category

To delete a folder, click on the **x** at the end of its row in the View Categories list in the Admin Console. Here you will be prompted to confirm the deletion. If the folder is currently in use, you will be shown the following prompt informing you of which Views currently use the folder. You will not be able to delete the category until the views have been reassigned.

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