

GENESYS

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SMART User Manual

Create an Empty Category

Create an Empty Category

Set the Category properties and define its attributes (such as name, description, elements, and so on), according to the related business issue.

Before you begin

Analyze your Business Needs

Procedure

- 1. Select Category Manager.
- 2. In the Category list, select **All** to create a new independent category or select an existing category to create a new subcategory.
- 3. Click New Category T or right-click All and click New Manual Category T.

The blank new category properties window opens

Name New Category(4) Shared with All Edt Description X And Or Not () -> Copy Paste Paste
Description And Cr Not () -> Copy Paste
And Or Net () -> Copy Paste
Element Properties
Center & Properces
Type
Add

- 4. In the **Name** field, enter a category name.
- 5. To limit the types of SpeechMiner users that have access to this category: (optional)
 - a. Click Edit.

The **Category Sharing** dialog box opens.

By default, Categories are shared with all SpeechMiner users. You can change this by specifying groups, work groups, roles, and/or specific users with whom a category should be shared. Category sharing does not affect which interactions a user can see or play back.

🔡 Category Sharing	
Share with all Share with groups:	
☐ Chicago ☐ Default ☐ London	
Share with roles:	
 Administrator Event Audit Power User Regular User SMART Power User SMART User 	
Share with users:	
Filter by text:	
 Admin Admin (administrator) Janice Smith (jsmith) Libby SB (libby) Maynard Hill (maynard) Miles Jones (mjones) Shiela Mann (shiela) 	
OK	Cancel

- b. Select the groups, roles, and/or users with which the Category should be shared.
- c. Click **OK**.
- 4. Under **Description** enter a description of the Category. (optional)
- 5. Click **Save**.

Important

If the new category is a regular category, you can configure its conditions, as explained under Configure Category Conditions, before you save it. If the category is a parent category or a manual category, it does not require any additional configuration, and must be saved at this point.

What to do next

Configure Category Conditions

Related Topics

Categories Introducing the Category Interface