Managing user categories for customer users

You can create user categories for a customer and assign a user category to a user. The user category can be used to filter users when you create a task or task template, when you view users on the Manage Access page, when you view tasks on the Manage Tasks page, and when you search users.

1. On the navigation toolbar, click **Manage Access**.
2. Select the customer for whom you want to create user categories. You can select **Site** if you want to create a user category for all customers.
3. From the **User** menu, select **Manage User Categories**.
4. Perform one of the following actions:

To:	Do this:
Add a new user category	a. In the Manage User Categories dialog box, in the **Name** box, type the required user category name and click **Add**. b. Click **Save**.|
Update a user category	a. In the **User Categories** list, select the category that you want to update. The name of the category that you selected appears in the **Name** box b. Make the required changes and click **Update**. c. Click **Save**.|
Delete a user category	a. In the **User Categories** list, select the category that you want to delete. b. Click **Delete**. c. Click **Save**.|

The defined user categories appear in the Create User and Edit User Information dialog boxes. You can assign a user category to the user.