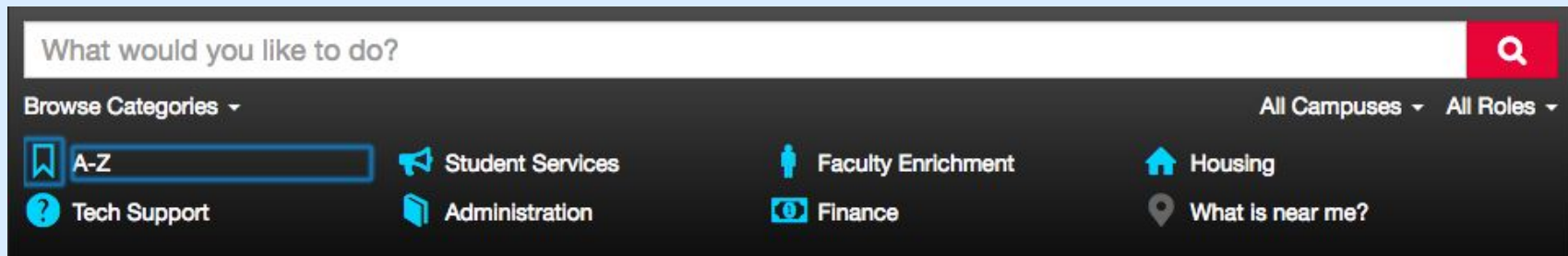


Quick Start Guide - Categories

Organize Tasks into relevant groups or buckets with Categories.

Categories help you organize similar or related tasks. Before creating your first task, you will need at least one Category. When using a desktop or full browser, Browse Categories can be found directly below the search bar. For smaller screens (mobile or tablet) it appears as a drop down list from the menu icon.



Add a Category

- 1 Begin by clicking the **Filter Settings** menu, then click **Categories**.
- 2 Click **+New Category**.
- 3 Enter a **Name** for the Category. **[Required]**
- 4 Enter a **Unique Key** **[Required]**
 - Unique Key can be the same as the name, however it may only contain lowercase letters, numbers, or dashes (no spaces).
- 5 Select an **icon** to represent the Category. **[Optional]**
 - Click within the icon field to choose from the list of available icons.
 - The default is icon-dot.

- 6 Enter an **Icon Color**. [Optional]
 - This field accepts both Hex color or standard color formats.

- 7 Select a specific **Role** for the Category, if applicable. [Optional]
 - The default is All Roles

- 8 Click **Save** and repeat the above steps to create additional Categories.

To edit, view, or delete a Categories, repeat step 1 and click on the appropriate Action (Edit, View Tasks, Delete).

Notes:

- *If you would like to change the display order of the categories, simply click and drag them into the desired order directly on the Category list page.*

Display Order	Icon	Name	Actions		
⋮ 1		A-Z	Edit	View Tasks	Delete
⋮ 2		Student Services	Edit	View Tasks	Delete
⋮ 3		Faculty Enrichment	Edit	View Tasks	Delete
⋮ 4		Housing	Edit	View Tasks	Delete
⋮ 5		Tech Support	Edit	View Tasks	Delete
⋮ 6		Administration	Edit	View Tasks	Delete
⋮ 7		Finance	Edit	View Tasks	Delete

- *Tenant data for Categories can be exported into a CSV file. The “Export Categories” button can be found in the upper right hand corner of the Categories page. Data can be exported for the current page (just the items showing) or all pages, where applicable.*