Using Categories



Objective

This document provides instructions on how to use categories in Outlook 2013 (after your LAUSD mailbox has migrated to Office 365).

Part 1 - What are Categories?

Categories apply color to items in your Mail, Calendar, People, Tasks, and Notes. In other words, you use categories to label your messages and related items, so that you can organize and track them quickly.

Categories appear in Mail as colored boxes in the Message List and colored bars in the Reading Pane. For example, you could categorize all District communications in orange and those from your Principal in purple.

| Search Current Mailbox (Ctrl+E) 🔎 🛛 C | urrent Mailbox 🔻 | 🕰 Reply 🛱 Reply All 😂 Forward | | | |
|--|------------------|---|--|--|--|
| All Unread By Date (Conversations) | Newest 🎍 🔺 | Tue 5/27/2014 1:55 PM | | | |
| ⊿ Last Week | | Kelly Krout | | | |
| Yammer Julian, wondering what to do with Y Fri 5/30 sadatrain.onmicrosoft.com | | RE: Action Required: Northwind Traders Contract To Molly Clark; Alan Steiner; Julian Isla; Karen Berg | | | |
| Alicia Thomber Friday Notes Jessica Hylton Trainer SADA Systems | ! Fri 5/30 | District This message was sent with High importance. | | | |
| Northwind Traders The "Northwind Traders" site has a ne Now you can send mail to | Tue 5/27 | I'm also available to help out if you need anything Karen, just let me know! | | | |
| Amy Alberts; Alan Steiner; Contoso's 3rd Annual Hiking Trip All, | 0 Tue 5/27 | Kelly | | | |
| Kelly Krout; Molly Clark; Ala Action Required: Northwind Traders I'm also available to help out if you | ! | To:: Man Steiner; Julian Isla; Karen Berg Cc: Kelly Krout | | | |
| Renee Lo Action required on new partner acco Hi Karen, Congratulations on your | Tue 5/27 | Subject: RE: Action Required: Northwind Traders Contract Karen, | | | |

Part 2 – Apply Categories to Mail

- 1. Select one or more messages that you'd like to categorize.
- 2. Right-click a selected message, click Categorize, and select the category you'd like to apply.



You can also access the **Categorize** menu from the Home tab in the top left corner to apply categories.

| 🔯 🔚 🗲 🗸 | Inbox - juliani@sadatrain.onmicrosoft.com - Outlook | | | | | | | | | |
|--------------------------------------|--|---|---------------------------|---------------------------------------|--------------------|------------------------------------|--------------------------|---|--|--|
| FILE HOME SEND / RECEIVE FOLDER VIEW | | | | | | | | | | |
| New New Email Items + | Reply Reply Forward In More - | ! Action Required [™] M □ Team Email ✓ D [♥] Create New | love to folder 🕒 one 📿 | To Manager ^ Reply & Delete ▼ ▼ | Move Rules OneNote | Assign Unread/ Ca Policy + Read | ategorize Follow Up + | Search People Address Book Filter Email • | | |
| New Delete | Respond | | Quick Steps | Fa. | Move | Т | <u>C</u> lear All Cate | gories nd | | |
| ▲ Favorites | Search Current Mailbox (Ctrl+E) | | | 🗛 Reply 🙀 Reply All 😋 Forward | | | Call Back | | | |
| Pipeline | All Unread By Date (Conversations) * Newest 4 | | | Mon 5/26/2014 2:11 PM | | | District | | | |
| ✓ juliani@sadatrain.onmicrosoft.com | | U | | Christa Geller | | | Follow Up | | | |
| | | 5/26/2 | 014 | Interr | | Principal | | | | |
| ∡ Inbox 11 | Hello - | | To | To All Employees | | | Red Category | | | |
| Active Projects | Dan Jump | | | | | | Blue category | | | |
| Newsletters | Retirement of Shmuel Yair Dear All. It is with mixed feelings | 5/26/2 that we announce | 014 | 💛 Message 🛛 🚺 Inte | | Green category | | | | |
| Northwind | | | _ | Action Items | | | Yellow category | | | |
| Pipeline | Dan Jump | U 5050 | 014 | | | | All Categories | - | | |
| Yammer | Hello this is Dan Jump. As many of you know we | | 014 | Hello - | | | Set Outleb Clie | | | |
| Drafts | | | 0. | | | | Set Quick Clic | Km | | |

Part 3 - Edit a Category

1. Select the Home tab in the top left corner, click Categorize, and select All Categories.



2. This opens the Color Categories window. Select the category you'd like to edit.



3. To rename the category, click **Rename**, type the new name, and press **Enter**.

- 4. To change the color of the category, click the **Color** menu, and select the new color.
- 5. Click **OK** to save your changes.

Part 4 – Apply Categories to Other Outlook Items

The Categorize menu is available throughout Outlook, either on the Home tab or via the right-click menu. This allows you to label related items in these views:

- Appointments and Meetings in Calendar
- Contacts and Contact Groups in People
- Tasks
- Notes