

Using Outlook Categories

Overview

Categories are a very useful way of grouping related Outlook items together.

They may be assigned to any Outlook item, including e-mail, calendar entries, contacts and tasks, (most people however tend to use them just to keep tabs on their e-mail).

Outlook comes with several colour-coded categories already setup and these offer a quick and easy way of managing related e-mails. In addition though, you can setup your own custom categories. You can also assign more than one category to an item.

Custom categories can refer to anything that's relevant to your job – such as project, department, sales region, product range, cost centre etc.

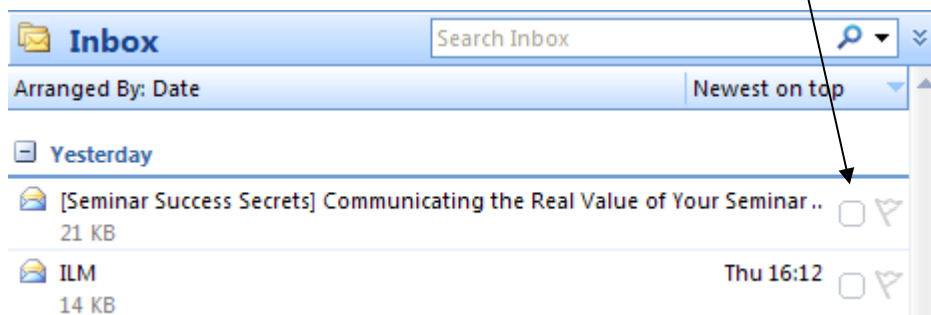
Once created and assigned you can then quickly search and group items by category.

Using Standard Categories

Assigning a Category to Mail

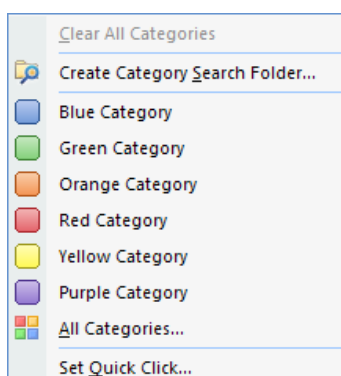
To assign a standard category to an e-mail...

- Open your inbox and take a look at the mail items in it
- You will see a small white square to the right of each

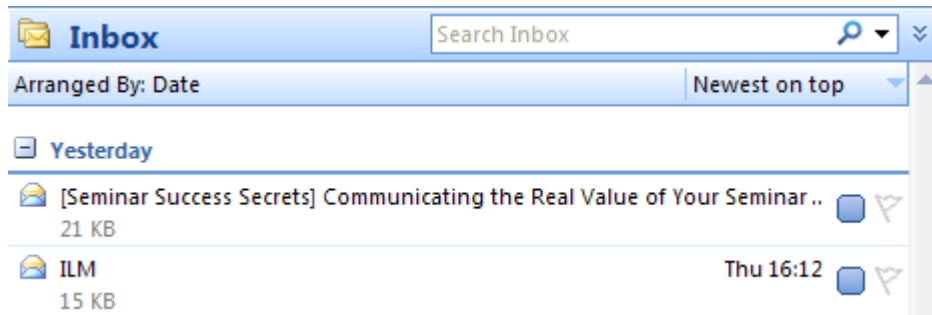


NB : this square is the key to using categories.

- **Right Click** the square to see a list of available categories...



- Next **Click** on the desired category to use it, (for example you could select the Blue category to remind you that a reply is expected)
- Continue until you have categorised everything you want to
- The example below shows the Blue category assigned to the first two inbox items...



Removing Categories from Mail

Category selection is a 'toggle' so to clear an individual category...

- **Right Click** on the category square and select the colour category again

Or...

To clear all categories...

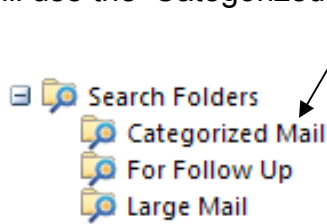
- **Right Click** the category square and select 'Clear all Categories'

Searching by Category

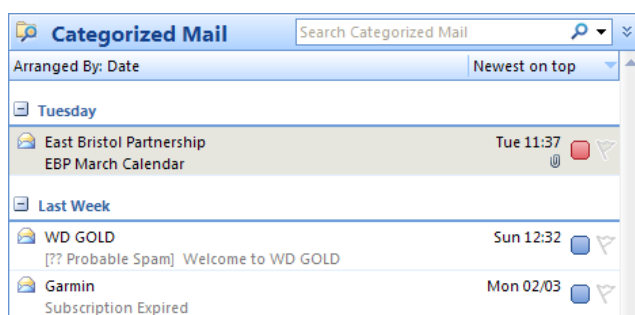
Once you have assigned categories it's easy to find everything that uses them.

Take a look at the bottom of the left-hand folder list and you will notice an area entitled 'Search Folders'.

These can be used to search for just about anything in Outlook. For now though we will use the 'Categorized Mail' folder.

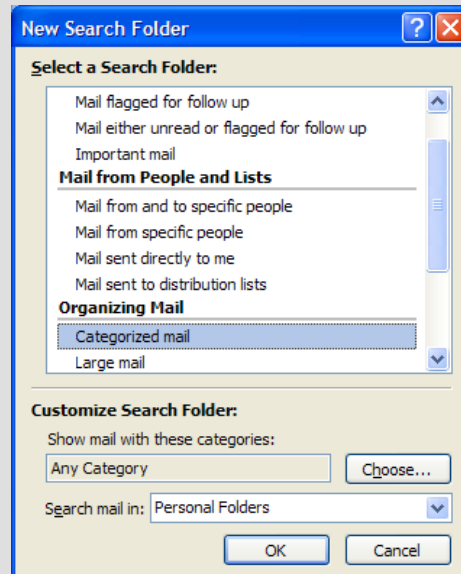


- **Click** on the 'Categorized Mail' folder to see all mail that has been assigned a category



NB

If the Categorized Mail search folder has been deleted you can re-create it by Right Clicking on the Category Square and selecting 'Create Category Search Folder'



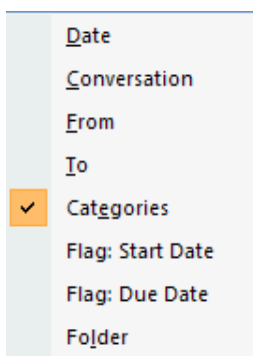
In the dialog the 'Categorized Mail' option is pre-selected.

Select OK to finish.

Sorting and Grouping by Category

To sort and group by category...

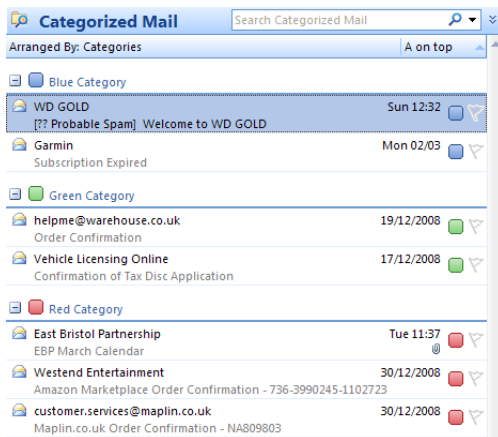
- **Right Click** at the top of the mail list where it says 'Arrange by : xxx'
- A pop-up menu will now appear offering a selection of possible groupings



- Select the 'Categories' option in this case

NB : it's worth experimenting with the other options later as they can also help to group related items together, (particularly 'From' and 'Conversation').

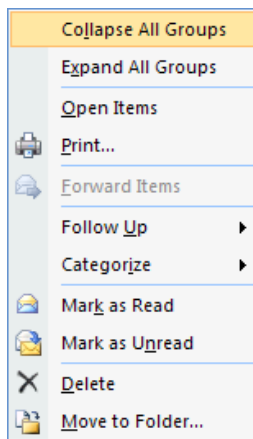
Your list of categorised e-mail will now be sorted and grouped by colour...



To see a condensed list with just category headings...

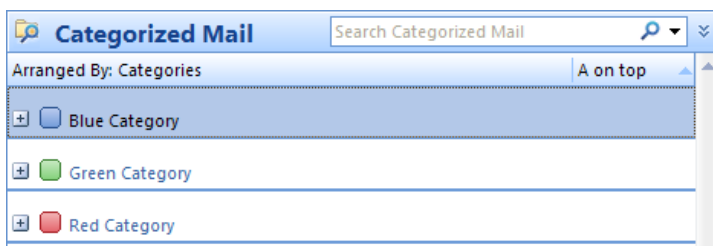
- **Right Click** on any category colour heading

You will see another pop-up menu offering a range of options, as below...



- In this case select 'Collapse All Groups'

The list should now be collapsed and much easier to manage...



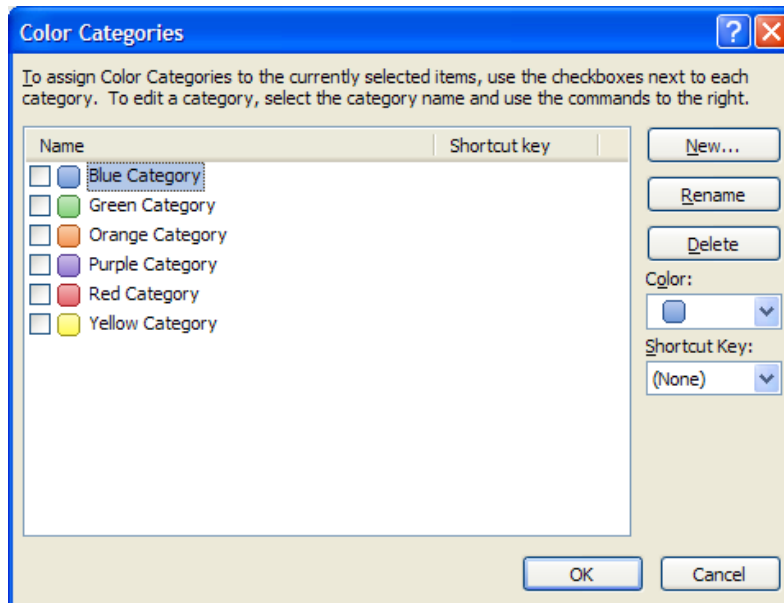
NB : individual headings may be collapsed and expanded again by Clicking on the small + or – next to each heading.

Using Custom Categories

Standard categories are very useful but you may find yourself wanting extra ones which you can assign a custom name to.

Fortunately this is easy to do.

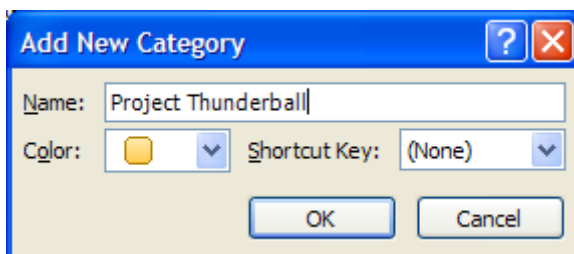
- **Right Click** on any category square (white or coloured) and select 'All Categories'
- You will now see the 'Color Categories' dialog box as shown below...



From here you can rename existing categories, delete old ones, assign shortcut keys and create new categories.

Creating a New Category

- From the above dialog box select the 'New...' button...



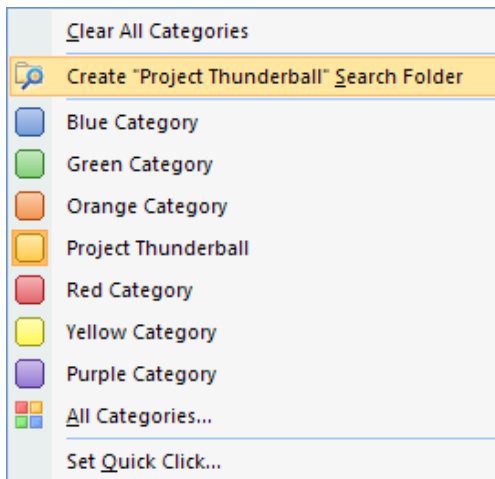
- In the 'Add New Category' dialog specify a name for the new category, a colour and shortcut key (optional)
- Select **OK** when done

Searching by Custom Category

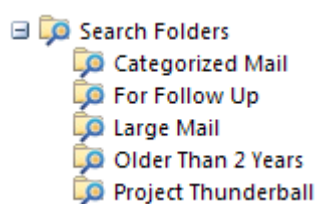
All of the search techniques mentioned above will work with custom categories as well.

However the really useful thing about them is the ability to create a custom search folder.

- Identify an e-mail that has a custom category assigned to it
- **Right Click** on its category square to see the usual pop-up ...



- You will notice that an new option is available to 'Create xxx Search Folder'
- Select this option and a new search folder will automatically be created...



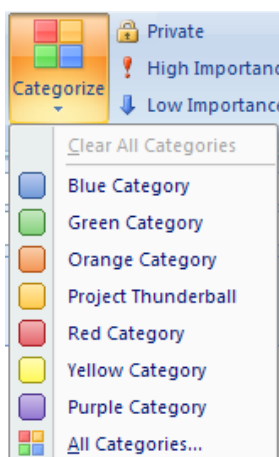
- Just **Click** the new search folder to find all mail items with that category assigned

NB : this can take a few moments initially, depending on the size of your mailbox!

Assigning Categories to Other Items

Whilst assigning categories to e-mail is the most common use for them you can also assign them to other Outlook items, such as calendar entries, contacts and tasks.

- Open the item you wish to associate a category to, (for example, **Double Click** an appointment in the Calendar)
- On the **Ribbon** select the **Categorize** button and the familiar drop-down will appear which works exactly as above...

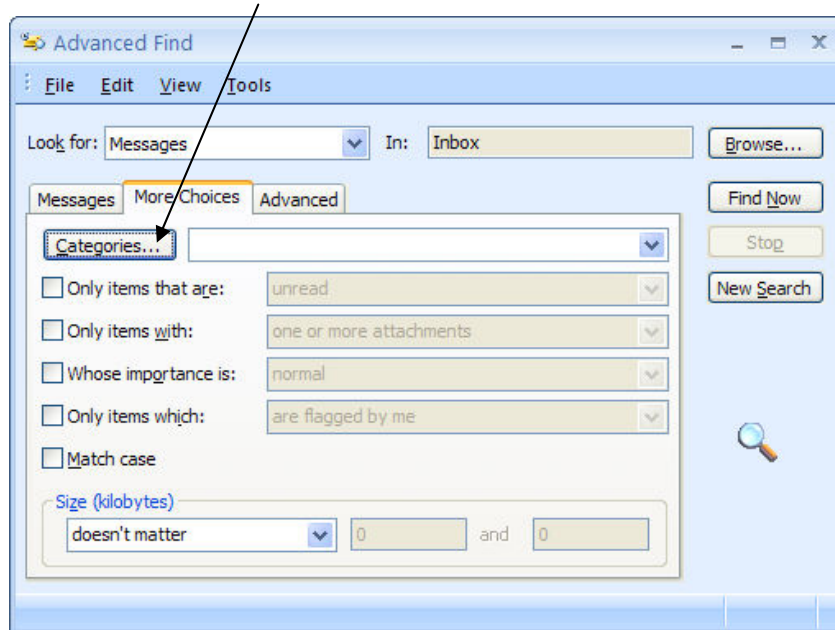


Advanced Find

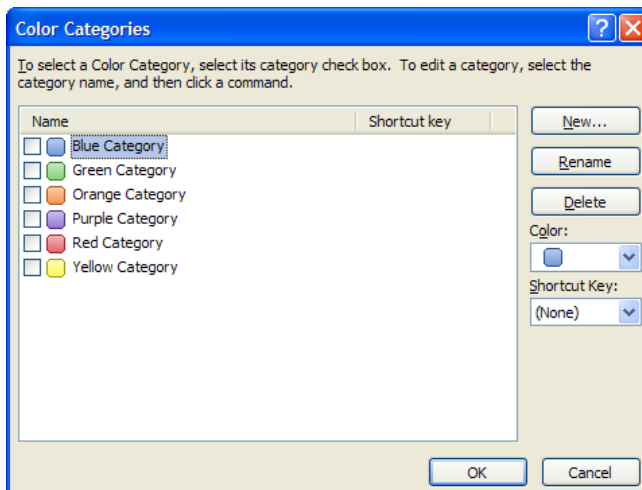
As we have seen there is a default Search Folder that will list all categorized e-mail and also the option to create a search folder for custom categories.

This works fine for e-mail but if you want to search for calendar items, contacts or tasks by category you will need to use the Advanced Find function instead.

- Select the **Tools** menu and then **Instant Search** and **Advanced Find**
- From the **Advanced Find** dialog select the **More Choices** tab and then the **Categories** button...



- You will now see the familiar list of available colour categories...



- Simply select an existing category and then **OK**
- Once done select the 'Find Now' button in the Advanced Find dialog to start the search

NB : it's worth exploring some of the other features of Advanced Search – they are very comprehensive!