

### Overview

**Categories** are color coding icons that you can apply to Outlook items (messages, contacts, tasks) so that related items can be grouped. The first time you use a color category, you will be prompted to assign a name to it. You can then also use the categorization as a search criterion for content in your Outlook account. This handout will cover applying categories; creating custom color categories; sorting by category; and creating a custom search folder to search by category.

**Applying Categories.** Categories are available through the Actions Menu, shown in Figure 1 here.

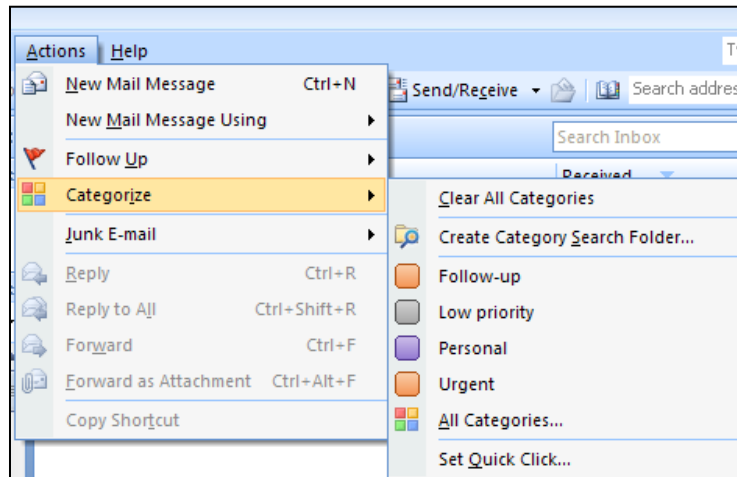


Figure 1: Category Menu

When you open a message, a contact, a task, or an appointment, the Categorize Button will also allow you to categorize the item while it is open in a window. Use the following steps to categorize an Outlook item.

- 1) To categorize from the Outlook main window, click on the item you wish to categorize. From the **Edit** Menu, click on **Categorize** and choose a category.
  - a) If this is the first time you are using the category, the Rename Category Dialog Box appears.
  - b) Type the name of the category, confirm that the correct color has been chosen, and click the  button to save it.

- 2) To categorize from the open item (i.e., the item is open in its own window):
  - a) Display the **Message Tab** on the ribbon.



- b) From the **Options Group**, click on the **Categorize** button. You will then be prompted to assign a category and, if needed, to rename it.

**Creating Custom Color Categories.** Custom categories are also known as user-defined categories because you can create specific color schemes to meet your needs.

- 1) From the **Edit Menu**, click on **Categorize** and choose **All Categories** to open the Color Categories Dialog Box.
- 2) Click the  button to open the Add New Category Dialog Box.
- 3) Enter the name of the category; select a color and (optional) a keyboard shortcut for the category, and click the  button to close the dialog box.
- 4) Click the  button again to close the Color Categories dialog box.

**Sorting by Category.** From the views of your Inbox, your contacts, your calendar, or your tasks, you can sort items by category. See Figure 2 below and follow these steps.

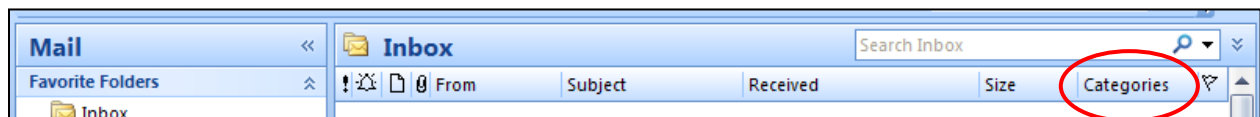


Figure 2: Sorting by Category

- 1) From the **View Menu**, choose **Arrange By**, then choose **Categories**.
- 2) From the Inbox, click on the **Categories** column heading to sort by category.

**Creating a Custom Search Folder to Search by Category.** You can also search for content in your Inbox if the content has been assigned to a particular category. See Figure 3 at right and follow these steps.

- 1) Click on a mail message; then, from the **Edit Menu**, choose **Categorize** and **Create Category Search Folder**. The New Search Folder Dialog Box appears.
- 2) Choose **Create a custom Search Folder**.

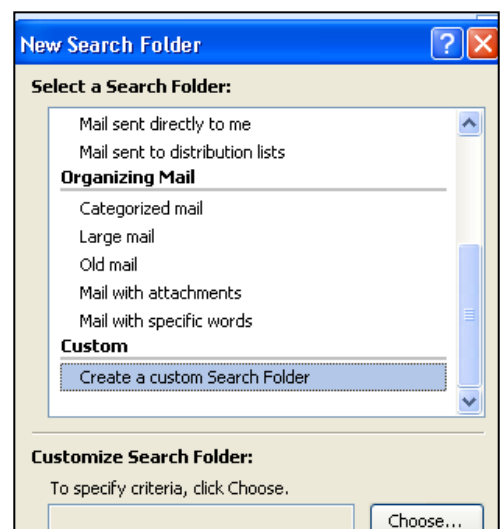
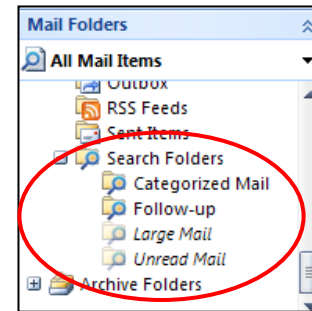


Figure 3: New Search Folder Dialog Box

- 3) To customize the search folder and specify criteria, click the  button. The Color Categories Dialog Box opens.
- 4) Select the category used for customizing and click the  button to close the Color Categories Dialog Box.
- 5) Click the  button again to close the New Search Folder Dialog Box.
- 6) From the Mail Folders area of the Navigation Pane, you should be able to expand the **Search Folders** to show your mail in a categorized format. See Figure 4. When you select the appropriate search folder, you are filtering the items in your Inbox to display these items by category.

If you have any questions about Microsoft Outlook 2007 or the techniques demonstrated here, please call the ITS Help Desk at extension 8900.



**Figure 4: Categorized Mail Search**