Using Outlook 2013 for Evidence Tracking

- Assign categories to emails and appointments (calendar events)
- Filtering/searching by categories

Categories are useful for keeping track of different types of items that are related but stored in different folders — for example, all messages, tasks, contacts and calendar items for a specific project. Assigning a category allows one to perform quick sorts and populate search folders. More than one category can be assigned to an item, and categories can be assigned to any type of item in Outlook (email message, calendar item, task, etc.).

Creating Categories:

Click Categorize > All Categorize > Click a category color and click Rename to assign a name (such as FPR or Merit or P&T) to the category to replace the color name. Category names should be short yet meaningful.

Assigning a Category:

In Mail view

![Mail view of Outlook](image)

In Calendar view

Single-click an appointment on your calendar to make the Calendar Tools Meeting (or Appointment) tab appear for accessing the Categorize button.

![Calendar view of Outlook](image)

Caution: If you fail to apply categories consistently, searches and sorts based on categories won’t tell the complete story.
Filtering/Searching by a Category (Calendar):

Filtering by a Category:
Change View to display items as a List

View Settings > Filter > Advanced tab > Field > Frequently-used Fields > Categories > Is Exactly > [type a category name] > Add to List

Filtering by a Date Range (replace ** with last two digits of year):
Advanced tab > Field > Date/Time fields > Start > On or after > 1/1/20** > Add to List
Add an end date criteria by clicking Field > Data/Time fields > End > On or before > 12/31/20** > Add to List > OK
Sort by the Start date by clicking the column heading in the listing. Print in Table Style format.

Caution: Don't forget to click Change View > Calendar and Reset Current View to restore your calendar back to its original view settings (otherwise, you will only see appointments that have been assigned the FPR category).