



# Documentation For Category-Manager 5

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## Note

If an older version of Category-Manager is already installed, first uninstall it via the control panel, and then install the new version.

## New since version 4

### Supported versions of Outlook

New is the support for Outlook 64bit. Category-Manager 5 supports Outlook 2007 (32bit), and Outlook 2010, 2013, 2016 (32bit and 64bit).

### Manage categories

Now Category-Manager can keep folders open, and you can easily add to or remove folders from the selection.

The look of the dialog has changed, now it features more space for what's important. You can hide the filter settings, and if no folder is open, the item list will be hidden.

The items filter now supports the selection of multiple types. The filter for the amount of assigned categories supports more conditions, too.

### Copy list of categories

Now you can easily copy your category list from one data store to another one.

### QuickCats

The filter for Outlook folders has added conditions, choose "Is equal", "Is unequal", "Doesn't contain", "Is empty", or "Isn't empty".

### IMAP

Outlook doesn't support categories for IMAP accounts. Category-Manager could workaround that – that depends on your mail server. Read more in the section "[Settings](#)".

## System requirements

Microsoft Outlook version 2007 - version 2016 (32bit and 64bit).

Microsoft Windows XP - Windows 10 (32bit und 64bit).

## Support

Please send your support requests via E-Mail. Click "Support" on the ribbon of Category-Manager.

That will create an email with information about your system and an error log file. And then click on "Send" in order to send the e-mail.

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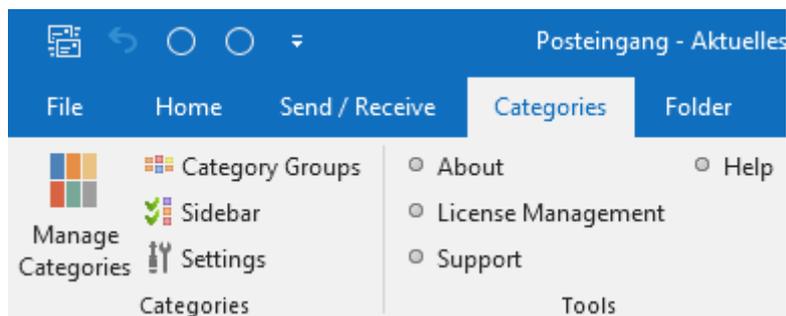
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## Start – Commands on the Ribbon

If you start Outlook after the installation of Category-Manager, you'll see the new tab "Categories" on the Ribbon.



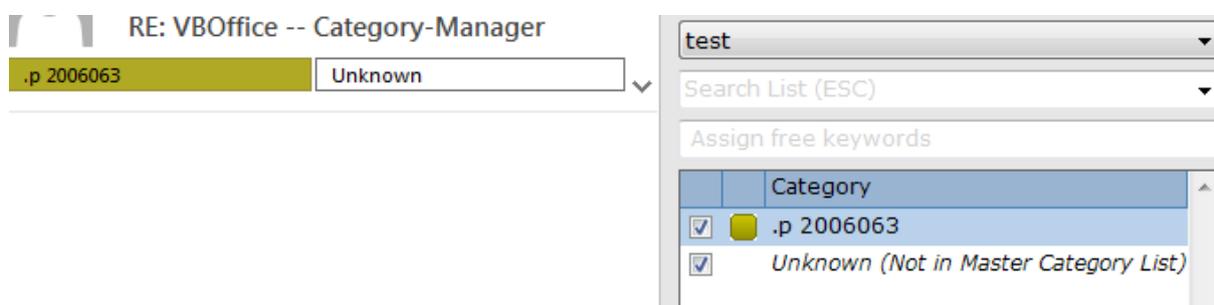
Use these commands to call the functions of Category-Manager, which are explained in the following.

## What are categories in Outlook?

Using categories, you can organize all Outlook items topically, independent of their types (e-mail, contact, etc.) and independent of the folders in which they're stored. For example, you can assign tasks and e-mails to one project category.

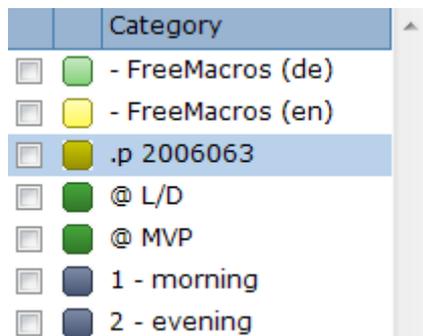
The Master Category List is the list of all your categories. From this list you can pick a category and assign it to an item, Outlook then stores the category name with that item. Since the name is now stored twice it's possible to have categories in items that don't exist in the Master Category List.

Colors are stored only in the Master Category List. So, if Outlook doesn't find the category name assigned to an item in the Master Category List, it cannot display any color.



**Sort order:** All entries are sorted alphabetically. By using preceding ordinal characters, you can group categories additionally by topic, so that the entries will be sorted next to each other in the alphabetical list.

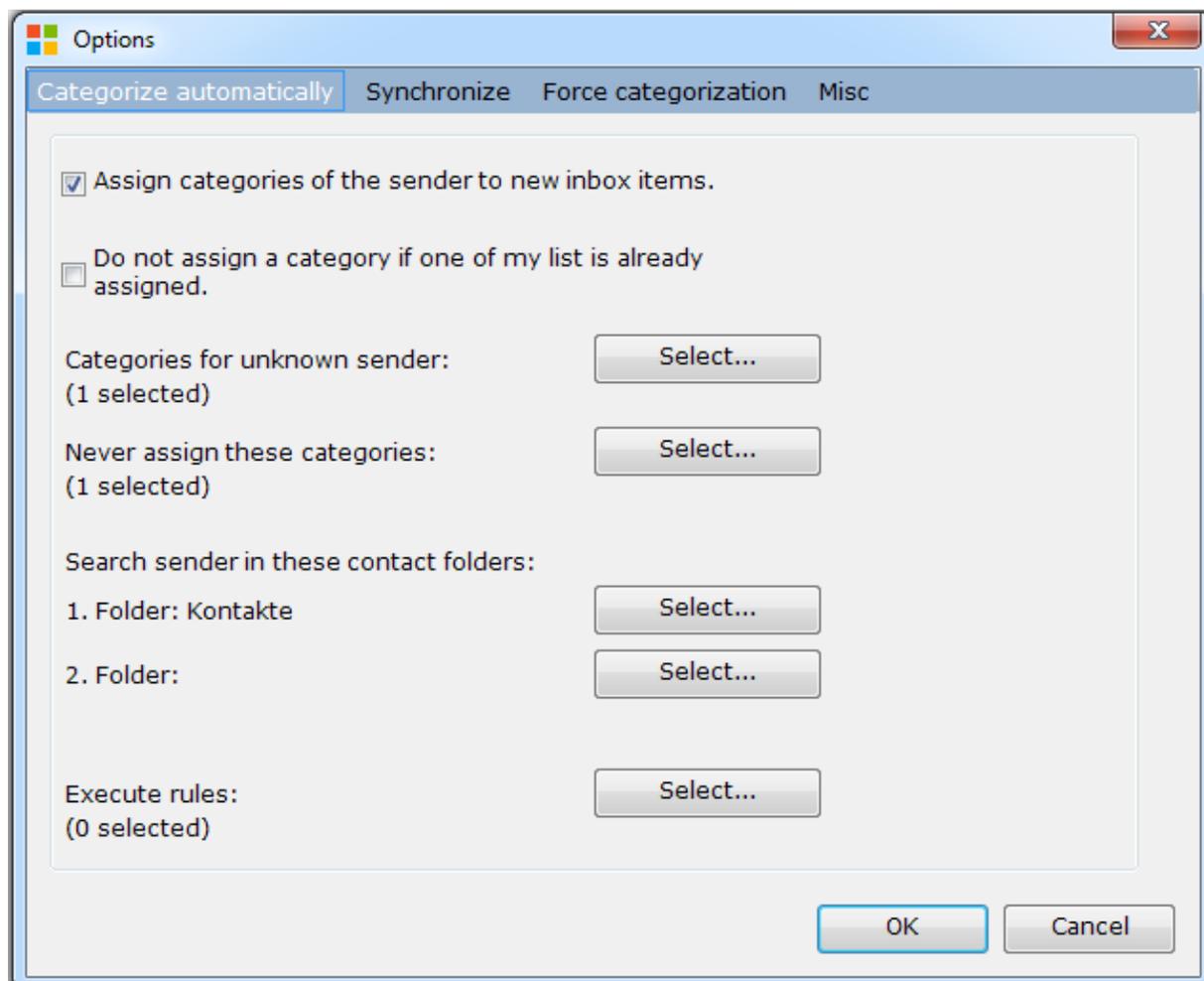
The sort order is: !, ., @, digits, letters.



## Settings

### Categorize automatically

Category-Manager can assign categories automatically to your new inbox items if the sender is found in your contacts folder.



Only new e-mails in your default inbox will be treated. Older e-mails will be treated if you've received them within the last two days.

**Do not assign a category if one from my list is already assigned:** If this option is set, no category is assigned if the e-mail has already any category of your own Master Category List assigned. If it has only unknown categories assigned, yours will be assigned, too.

**Categories for unknown sender:** If the sender of the e-mail cannot be found in the contact folders, these categories will be assigned.

**Never assign these categories:** Select categories that should never be assigned even if they are assigned to the sender.

**Search sender in these contact folders:** Choose up to two contact folders where the senders should be searched.

**Execute rules:** If you have Outlook rules created, you can select here the ones that should be executed after Category-Manager has assigned the sender's categories.

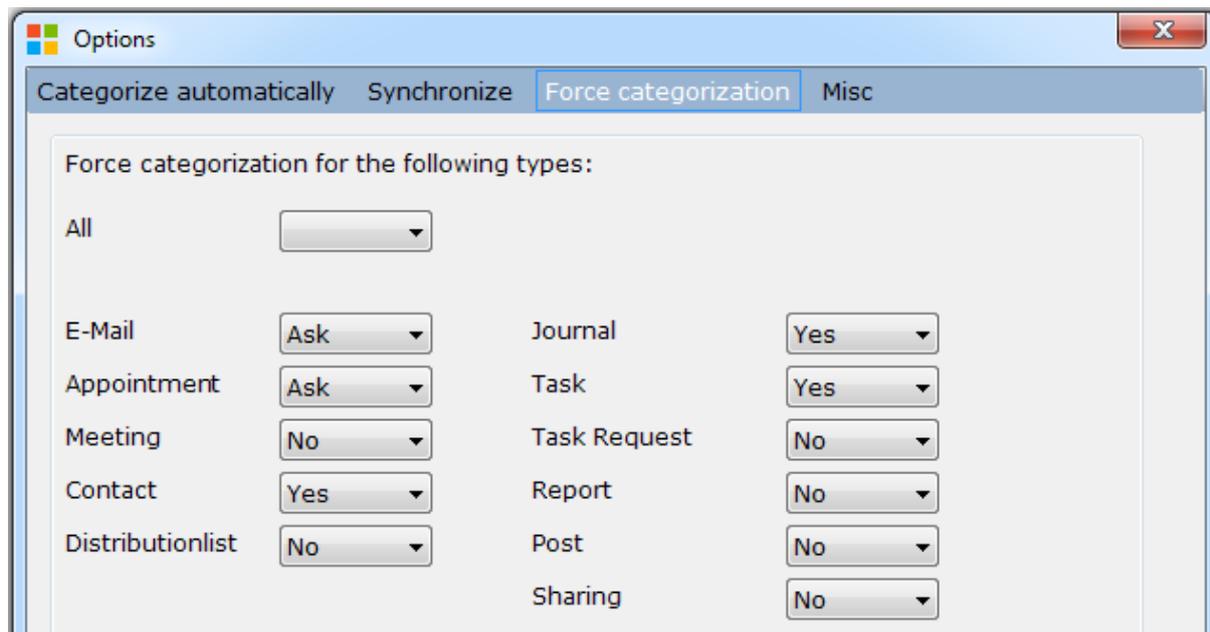
For instance, create an Outlook rule to move all e-mails of a certain category. Category-Manager ensures that the category will be added first, and then it calls the rule to move the e-mail.

## Synchronize

Read about this in the section "[Synchronize categories](#)".

## Force categorization

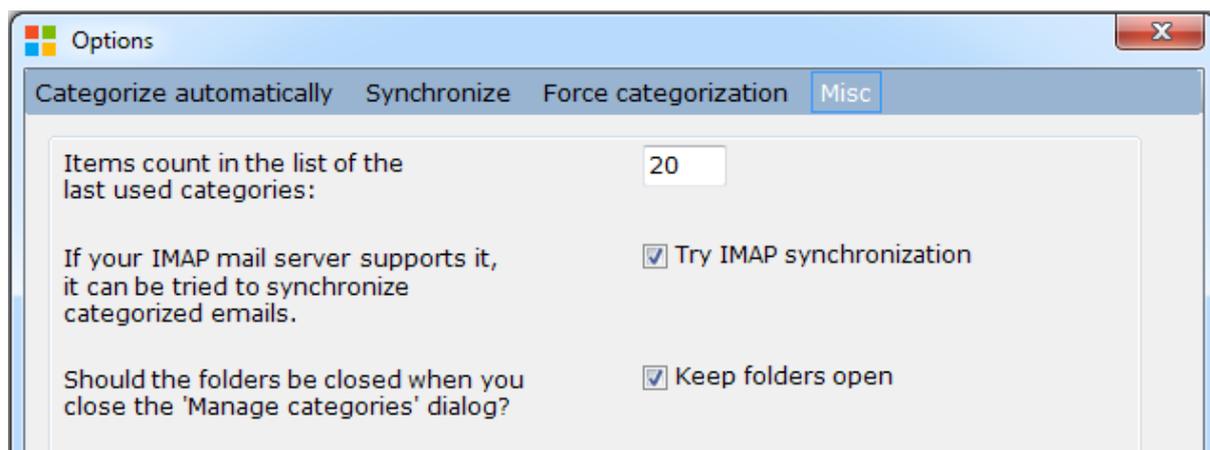
Category-Manager helps you categorizing all important items. For each item type you can set a reminder.



By selecting a value from the “All” fields, the same selected value will be assigned to all of the other fields.

- **Ask:** Before closing or sending an item (or when changing the folder selection while the reading pane is visible) you will get a prompt if that item doesn't have a category assigned yet.
  - Click Yes then to assign a category; the QuickCats side-bar will be opened for you.
  - Click Later if you wish to get another reminder at a later time.
  - If you click No, then you won't get another reminder for that item again.
- **Yes:** You will get a prompt if a category is missing. The difference to the reminder is, you cannot choose but must assign a category.
- **No:** Turns the feature off for that item type.

## Misc



**Last used categories:** Determine how many entries the list of the last used categories should have at most. With the [QuickCats](#) side-bar you can quickly access these categories.

**Try IMAP synchronization:** Outlook doesn't support categories for IMAP accounts. Outlook's Categorize button is disabled in that case.

Actually, the problem is not that you cannot categorize an IMAP message but that some mail server doesn't support that. That is you can categorize an IMAP message but that's locally only, the categorization won't be sent back to the server. So, if you look at the same message on another computer, it displays without any category.

Category-Manager allows categorizing the email of an IMAP account and then sort of stimulates Outlook to synchronize the email with the server. Since not all mail servers support this, it will work in some cases and won't in others. Please test yourself whether or not it works for you. In order to test it, categorize an email in an IMAP account by using Category-Manager's sidebar. If you then look at the same message on another computer after a certain period of time and you see the assigned category name on it, it works. If it doesn't, there's no way around. Your alternatives then are switching to a POP or Exchange account, or trying a different IMAP provider.

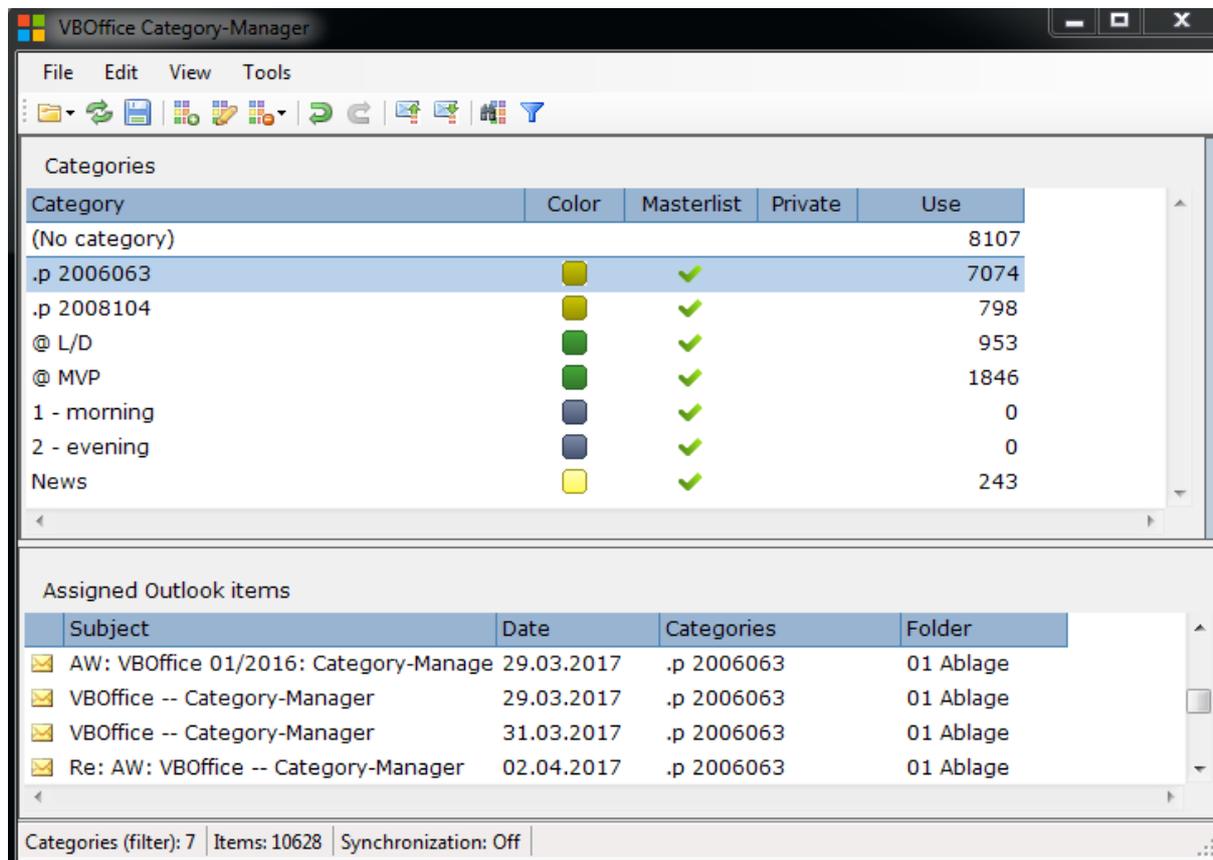
By sending large messages back to the server a delay could occur when you assign a category. If that leads to an unwished annoyance, or if it doesn't work at all, turn off that feature, please.

**Keep folders open:** The Outlook folders you open via the [Manage Categories](#) dialog will be closed by default when you close the dialog. If the setting "Keep folders open" is checked, the folders won't be closed, and their contents will be displayed automatically at the next startup of the dialog. Since loading large amounts of data can take some time, this could lead to a delay before the dialog will be displayed.

Anyway, this setting impacts only the current session. After a restart of Outlook all folders are closed.

## Manage categories

Via the command “Manage categories” you’ll get to the main dialog. As long as no folder is open, only the category list is displayed.



### The category list

The category list (upper list) contains all categories of the Master Category List. After opening an Outlook folder, it may also contain categories that exist in items only.

Each column can be sorted in ascending or descending order by clicking on the column header. Drag the separator between columns to change the column width. Double-clicking a column separator will fit the column to the left to the longest entry in the column.

**First row (No category):** This entry lists all Outlook items that are not assigned to any categories. (No category) isn't actually a category because it does not function as categories do; you cannot rename this entry, nor can you add it to the Master Category List. The (None) entry will always appear at the top of the Categories list, and you cannot filter on it.

**Category:** Lists all category names.

**Color:** From Outlook 2007 on you can assign one of 25 colors to every category.

**Masterlist:** A checked box indicates that the category is in the Master Category List. If a category isn't checked, it exists only in one or more Outlook items.

**Private:** A checked box indicates the category is private. Private categories won't be synchronized with the public list. (Enterprise version only)

**Use:** Shows how many times the category is used in the Outlook items. As long as no folder is open this column is grayed out. The values can change by filter settings; for details, please see "[Filter settings](#)".

## The item list

The item list (lower list) is visible only when you open an Outlook folder (see also [Open folder](#)).

Select a category in the category list that is in use, then the item list will show all Outlook items from the opened folders the category is assigned to.

Each column can be sorted in ascending or descending order by clicking on the column header. Drag the separator between columns to change the column width. Double-clicking a column separator will fit the column to the left to the longest entry in the column.

**Subject:** The item's subject.

**Date:** The date the item was created or received.

**Categories:** All categories that are assigned to an item.

**Folder:** The name of the folder where the item is stored.

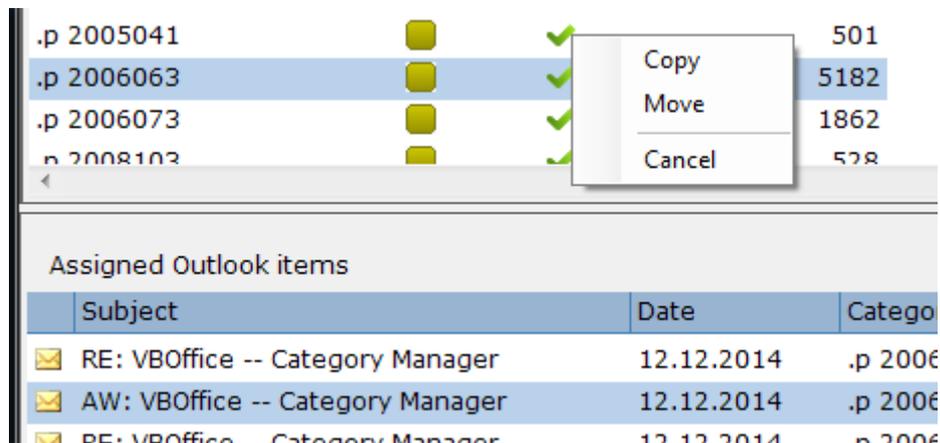
Right click on an item in the item list, then you can open multiple items at once via the context menu, or assign or remove categories (see also [Assign categories](#)).

Assigned Outlook items				
	Subject	Date	Categories	Folder
✉	AW: VBOffice 01/2016: Category-Manager	29.03.2017	.p 2006063	01 Ablage
✉	VBOffice -- Category-Manager	29.03.2017	n 2006063	01 Ablage
✉	VBOffice -- Category-Manager	31.03.2017		blage
✉	Re: AW: VBOffice -- Category-Manager	02.04.2017		blage

- 📁 Open
- 📁 Assign categories
- 📁 Remove categories
- Cancel

Categories (filter): 7 | Items: 10628 | Synchronization: Off

You can also quickly change the categories for multiple items by dragging the items from the lower item list onto a category in the upper category list. Using the left mouse button moves the items to the new category; that is any previous category will be replaced by the new one. Using the right mouse button copies the items to the new category; that is that category will be added to those that are already assigned.

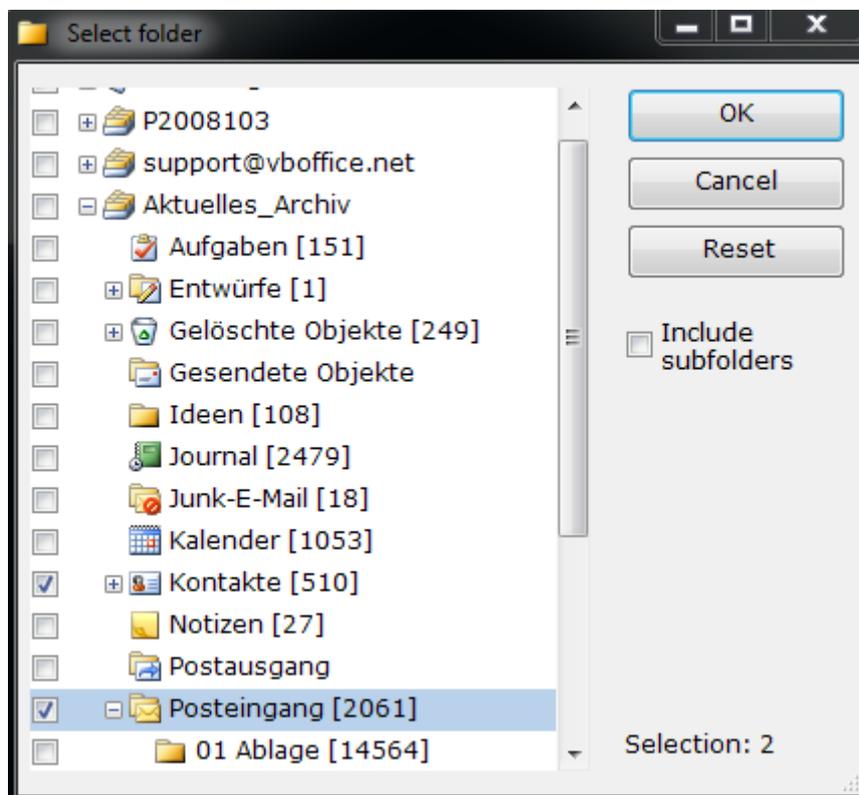


You can drag an Outlook item with the right mouse button onto an entry in the category list. When you release the mouse button you'll see another context menu in which you can select whether you want the item to be copied or moved to the category. If you drag an item into or off "(None)" (first row), there is no context menu; in that case, the item will be moved because copying into "(None)" is not possible.

## Open folder

Click View/Outlook folder to display the items of a folder and their assigned categories. This is necessary if you want to know the usage of a category, or if you want to change the category on items.

The dialog shows all available Outlook folders. The folder's item count appears in parentheses after the folder name. Any changes made with Category-Manager will be saved only to the folders you have selected in this dialog first.



Check **Include subfolders** if you want to open all subfolders of the selected folders, too. The more folders you select the longer does it take to open the contents.

In the menu View/Outlook folder there're two buttons for opening folders:

- "Open folder" displays the dialog without any pre-selection.
- "Edit selection" pre-selects the folders you had opened previously. This can take time if there's many folders, or a deep hierarchy of folders. So, if you don't want to edit the selection but select new folders, use the "Open folder" button instead to save some time.

The "Close folder" button closes all folders.

## Filter settings

If a folder is open, you'll get access to category and item filter via View/Filter settings. These filter help, for instance, finding categories that are not in use.

### Category filter:

By default, no filter is active; all entries will be shown. In the status bar (at the bottom left) you can see the total number of categories and the total number of Outlook items.

Category	Color	Masterlist	Private	Use
.p 2014123	■	✓		30
.p 2014124	■	✓		143
.p 2014126	■			16
.p 2014127	■	✓		53
.p 2015128	■	✓		9
.p 2015130	■	✓		54
.p 2015133	■	✓		16
.p 2016134	■	✓		67
.p 2016136	■	✓		33

Filter for categories:  All,  In use,  Not in use

Filter for items:  [All],  Task,  Email,  Journal,  Contact,  Note,  Message,  Appointment,  DistList

Number of categories: [All] 1

Categories: 256 | Items: 24640

For instance, the filter "In use" and "Not in Category list" hides all categories except those that are assigned to items and don't exist in the Master Category List.

Category	Color	Masterlist	Private	Use
Informatik				54
IT_PC-Administration				14
Mailingliste				968
Organisation				1
Personal Email				3
QM_Admin_Data_Tools				4
QM_Admin_Verrechnung				14
Rote Kategorie				5
Software				2

Filter for categories:  All,  In use,  Not in use

Filter for items:  All,  In Category List,  Not in Category List

Number of categories: [All] 1

Categories (filter): 46 | Items: 6142

Notice the changes on the status bar: Although there is a total of 256 categories after opening folders, 46 of them are not stored in the Master Category List. These 46 categories are assigned to 6142 Outlook items. If you wanted to add all of these 46 categories to the Master Category List, you could select all of the categories (press CTRL+A), right-click the selection to bring up the context menu, and choose Insert into Master Category List.

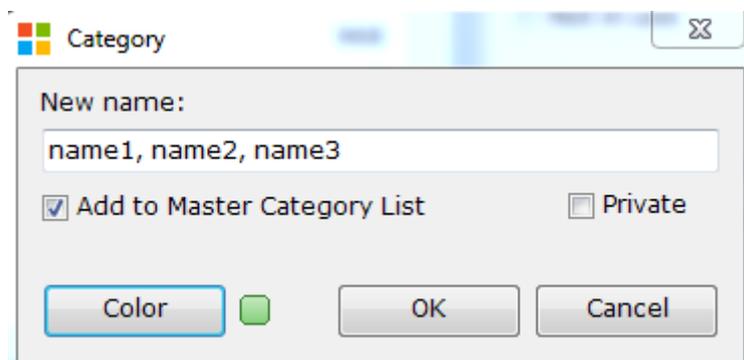
### Item filter:

Using the items filter, you can restrict the view to a particular item type (contact, e-mail message, etc.). You can also restrict the list to only those items with, for example, at least two assigned categories.

These settings are very helpful for finding items with too many assigned categories or items with no category at all. When you reorganize your category system, you'll often find old categories that are no longer needed. These entries make your category list cluttered and reduce its benefit to you; therefore, they should be deleted.

## Create or rename a category

You can create or edit as many categories as you like.



If you want to add multiple categories with the same color, enter the names separated by a comma or semicolon. If you rename a category only one item can be edited at a time.

**Important:** If you rename a category while folders are open, the category will be renamed both in the master category list and also in all items of the open folders. If folders are closed while you rename a category, the category will be renamed only in the master category list.

If a category is not kept in the Master Category List and is not appended to at least one Outlook item, that category will not be available the next time you open Category-Manager (or another folder).

## Delete categories

You can delete all selected entries from the category list by clicking the Delete button on the toolbar or by pressing the Delete key.

Even after you have confirmed the deletion, and even if you save the changes, it may still be possible to undo the Delete action.

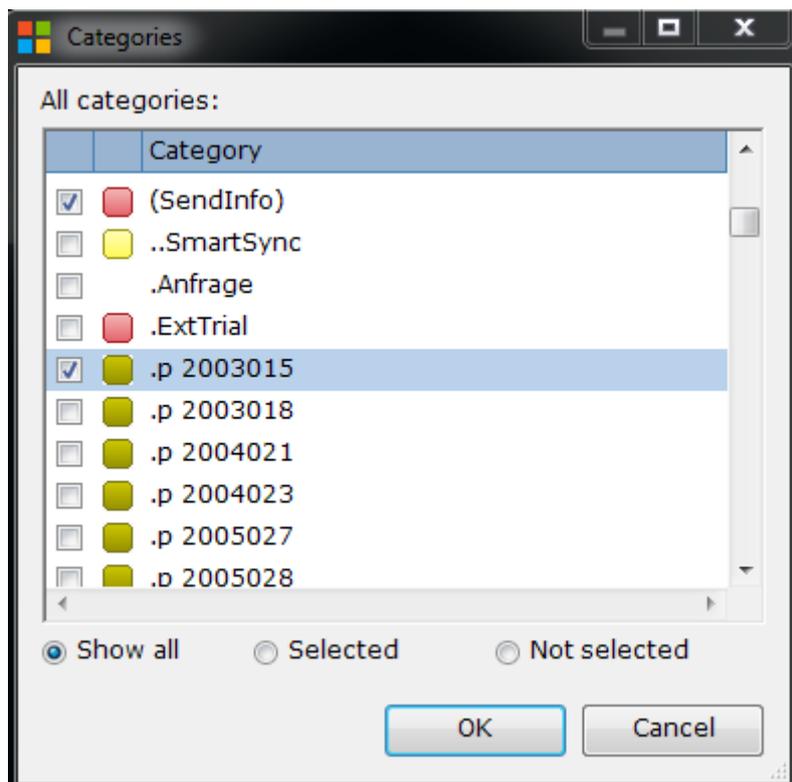
**Caution:** In the following situations the deleted categories actually will be permanently **deleted** and cannot be recovered:

- if you close Category-Manager,
- if you [select an Outlook folder](#),
- if you click the *Refresh* button,
- if the memory for undo/redo is full.

**It is strongly recommended that you make regular backups of your data!**

## Assign categories

Via this dialog, you can assign or remove categories to all items that are selected in the items list.



Removing a single category from an Outlook item is possible only via this dialog (or via the sidebar). If you want to remove all categories from the selected items, you can simply drag the selection from the items list onto the categories list's first row "(No category)".

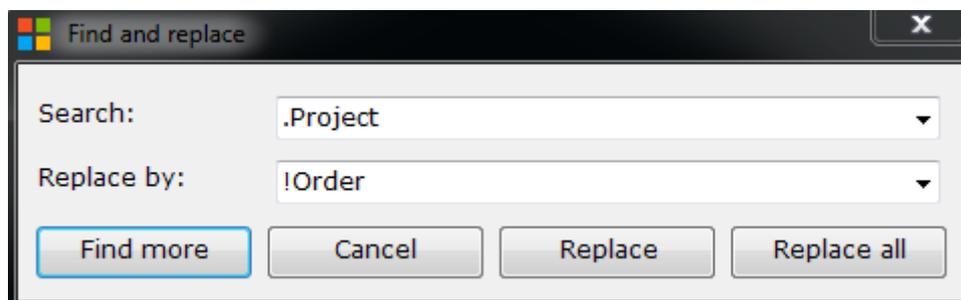
**Show all:** If this box is checked, all categories are visible.

**Selected:** If this box is checked, only those categories are visible that are assigned to the selected items.

**Not selected:** if this box is checked, only those categories are visible that are not assigned to the selected items.

## Find and replace

The Find and Replace function makes it even easier to organize your category system. For instance, you can easily rename category group names you have created so that they will be easier to read and find.



From Outlook 2007 on, the Rules Wizard will also reflect any changes you have made to your categories. For example, if you have a rule that assigns the category "Business" to incoming emails and you rename that category via Category-Manager, the rule will be updated accordingly.

## Export and import

Click Tools/Category List in order to import or export your categories. This feature has nothing to do with the synchronization feature that is available in the Enterprise version. Via this import/export you can create a backup of your Master Category List. You could also use it to manually exchange your categories with other users; however, if you need to do that on a regular basis, the Enterprise version with the automatic synchronization is recommended.

**Export:** You can export all entries in the Master Category List to the TXT and CSV file formats. The Master Category List will be exported; this will not export any items (emails, contacts, etc.) these categories are assigned to.

CSV files can be opened directly by many programs, such as Microsoft Excel.

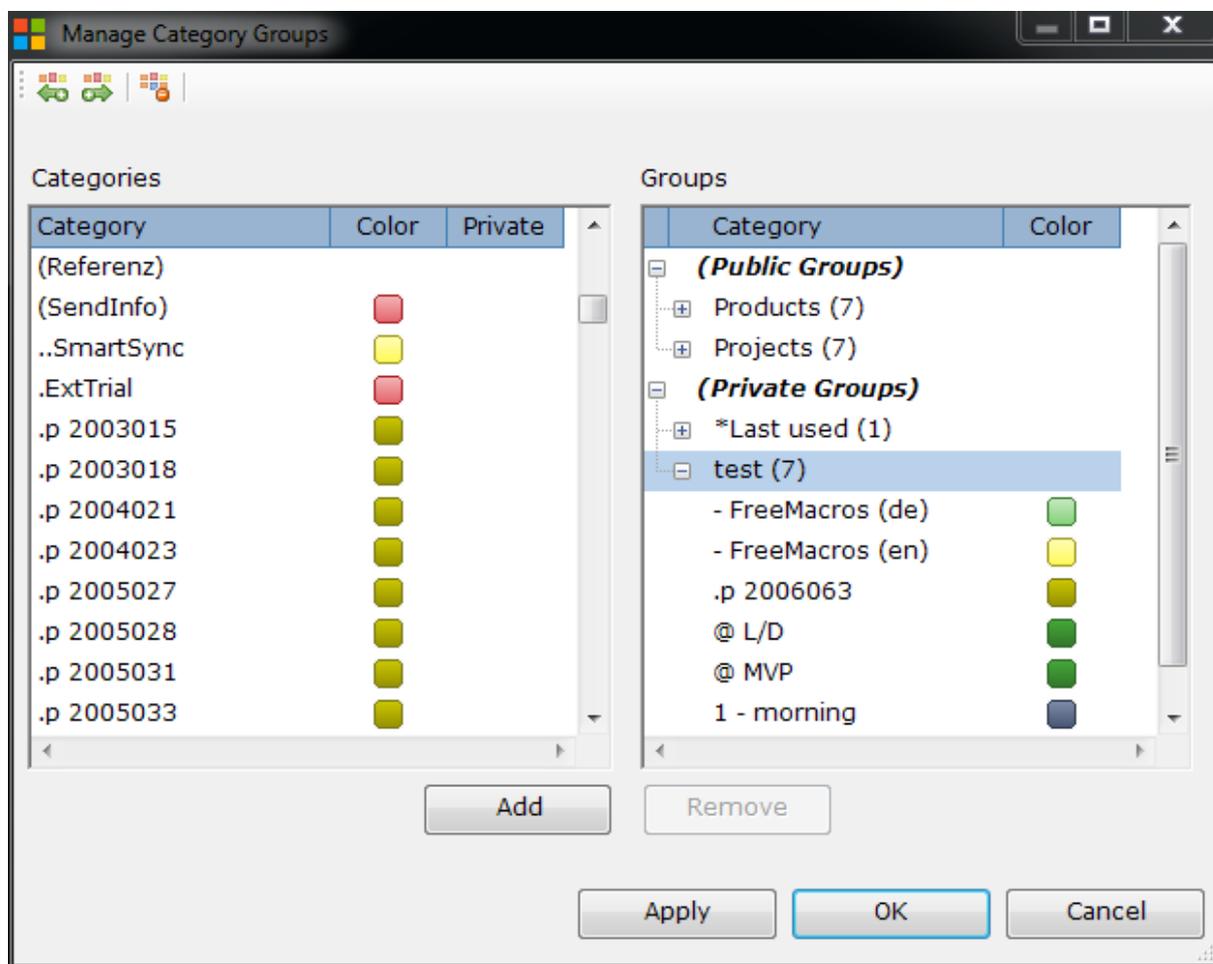
**Import:** In addition to the TXT and CSV file formats, REG (Windows Registry) files are also supported by the importing process.

In all previous Outlook versions including Outlook 2003, you could export the Master Category List from the Registry yourself, saving to the REG file format. Then you could import the REG file into another computer. The disadvantage to this method is that you would overwrite an existing Master Category List on the target computer.

By importing the REG file (or any other supported file) via Category-Manager instead, the new values will be added to the existing ones. You can then edit the new list, remove unnecessary entries, etc.

## Category groups

You can group your categories according to your needs. [QuickCats](#) displays the categories by these groups. This way you see only the categories you want, and all of the others are hidden.



[QuickCats](#) automatically displays the last used group for each folder type (calendar, e-mail, etc.). That is by default you can get other categories to choose from for your calendar than, for instance, for your e-mails.

**Default groups:** The default groups are marked with an \* character. These groups are created automatically, and you cannot rename or delete them.

**\*All Categories:** This default group contains the complete Master Category List.

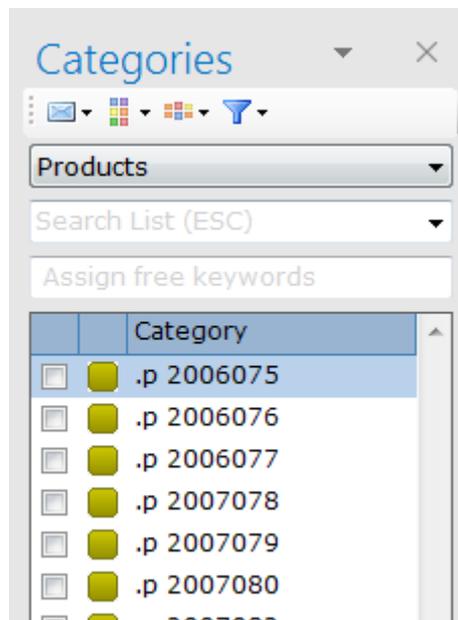
**\*Last Used:** This default group contains a list of the last used categories. The number of entries this list should have at most can be determined via the [settings](#).

**Private and public groups:** Public groups are available only in the Enterprise version. Public groups are synchronized and are available for all users. Private groups are not synchronized.

You can add public categories to private groups. The other way around is not possible, a private category cannot be added to a public group.

## QuickCats – The sidebar

With QuickCats you can very quickly assign any categories to e-mails, tasks, etc.



**Category groups:** Select one group from the list. Additionally to the categories of the selected group, QuickCats always shows the categories that are assigned to the current Outlook items.

*Tip: If you wish a view that displays only those categories assigned to the selected items, create an empty group for that.*

**Search list:** Type any text to find a certain entry in your list of categories. QuickCats always searches the entire Master Category List no matter which group is displayed. Press ESC to reset the filter.

**Assign free keywords:** This allows assigning any text as categories to the selected Outlook items. This way you can assign categories that are not stored in your Master Category List. In order to assign multiple categories at once, enter them separated by a comma or semi-colon.

**Assign group:** This button assigns all categories of the current group to the selected Outlook items.

**Remove categories:** This button removes all categories from the selected Outlook items. If you want to remove only a single category, uncheck it in the list instead.

**Copy/Paste:** This allows copying the categories between selected Outlook items. Additionally, the copied categories are also available in the clipboard, so you could also paste them into other applications or documents.

**Edit Master Category List:** Use the Add or Delete button to add selected categories to the Master Category List or delete them from it, respectively.

**Edit category groups:** Use the Add or Delete button to add selected categories to the current category group or delete them from it, respectively. If the categories are not yet in the Master Category List, they'll be added automatically to it.

**Filter Outlook folder:** This button filters the current Outlook folder by the selected categories.

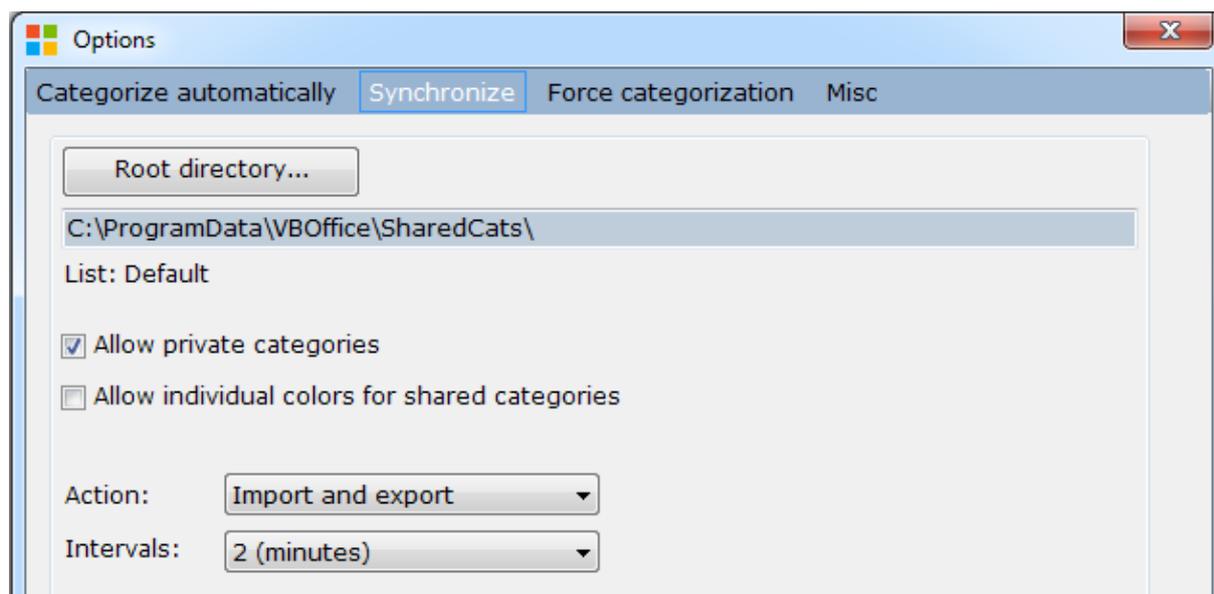
- **AND/OR:** Select the condition to be used if more than one category is selected.
- **Is Equal:** Displays all items the selected category is assigned to.
- **Is Unequal:** Displays all items the selected category isn't assigned to or those items that have another category additionally assigned to, respectively.
- **Doesn't contains:** Displays all items the selected category isn't assigned to.
- **Is empty:** Displays all items that have no category at all.
- **Isn't empty:** Displays all items that have any category assigned to.

For the conditions "Is equal", "Is unequal" and "Doesn't contain" you need to click on "Apply filter now" in order to apply the filter. For the conditions "Is empty" and "Isn't empty" that extra step isn't necessary.

By pressing **Reset Filter** the previous view is restored.

## Synchronize categories

With Category-Manager you can deploy categories, colors and category groups to all users.  
(Enterprise version only)



### Setup

- After the installation of Category-Manager click on its tab on the ribbon, then on "Settings".
- Choose a root folder for the public categories. Select a folder on the network every user has access to.

Category-Manager will then create some subfolder in the root folder. **These folders must not be renamed.** After that you'll be able to choose other synchronize options.

For now keep the "Allow private categories" option checked. (First read "[Private categories](#)" before you uncheck this option.) When you launch Category-Manager for the first time, all of your already existing categories become private if private categories are allowed (default). This will prevent categories being published or removed accidentally. The public list of categories is empty at the beginning, and your categories won't be uploaded automatically (default).

In order to create the public list of categories for the first time:

- Ensure via [Manage categories](#) that all the categories you want to be public are not marked as private.
- On the settings dialog select "Import and export".
- Close the dialog with OK.

## Important

Category-Manager creates the subfolder "user" in the root folder of your choice. For this subfolder every user must have write permissions. For every other folder in the root folder you could restrict the permissions as needed, for instance, if you want to ensure that only the Administrator is able to change the settings.

Also note: Without write permissions for the "Categories" folder or the "Categories.xml" file in it, respectively, an export of categories isn't possible.

## Import and export

The action determines how to synchronize the categories.

- Off: The categories won't be synchronized.
- Import only: Public categories will be imported to the Master Category List of the user at the set interval.
- Import and export: Additionally to the import all non-private categories of the user will be exported to the public list.

## Private categories

If private categories are allowed, the user can create categories that won't be synchronized with the public list.

A private category cannot be added to a public category group.

It is not possible to have the same category private for one user and public for the other ones. However, it is possible to have the same category private for two or more users.

If a user marks the public category "test" private, then that category will be deleted from the Master Category Lists of all of the other users. If a user turns his private category "test" public, then all of the other users will get that category, too.

This table shows the effects of the various settings:

Action	Private categories allowed	Effect
Import only	No	<ul style="list-style-type: none"> <li>The user cannot create categories via Category-Manager.</li> <li>The user cannot edit or delete public categories.</li> <li>All categories that do not exist in the public list will be deleted from the user's Master Category List.</li> </ul>
Import only	Yes	<ul style="list-style-type: none"> <li>The user can create only private categories, no public categories.</li> <li>The user can edit and delete only his private categories.</li> </ul>
Import and export	No	<ul style="list-style-type: none"> <li>All categories created by the user are public and will be available to all of the other users.</li> <li>The user can edit and delete all public categories.</li> </ul>
Import and export	Yes	<ul style="list-style-type: none"> <li>The user can create both private and public categories.</li> <li>The user can edit and delete both his private and all public categories.</li> </ul>
Off	-	<ul style="list-style-type: none"> <li>Categories won't be imported or exported to the public list of categories.</li> <li>The user can create, edit and delete categories. All changes are locally only.</li> </ul>

## Individual colors

If “Allow individual colors for shared categories” is checked:

- The user can set an individual color for a public category. That color won't be synchronized to the public list of categories.
- Even if the action is set to “Import only” the user can change the color of a public category for himself.
- The setting doesn't affect private categories.

If the settings isn't checked:

- For public categories the user will get the public colors.
- The setting doesn't affect private categories.

## Interval

Different intervals, ranging from real time to 60 minutes, are available.

- Categories will be imported and exported at the interval according to the chosen action.
- Even if no action is set, Category-Manager can react if a configuration file is changed server side. This way, for instance, you can rule out a single user from the synchronization temporarily, or connect the user to another central list of categories.

## Deleting categories

Categories will be deleted only from the Master Category List of the users. The synchronization doesn't delete anything from folder items like emails, contacts, etc.