COLOUR CATEGORIES

CHAPTER 5

INFOCUS

Colour categories help you to easily identify and group associated items within Microsoft Outlook. You can assign a colour category to a group of interrelated items − such as messages, contacts, notes, appointments, and so on − so that you can quickly and easily access or organise them. Outlook items can have more than one colour category assigned to them as some items may need to be grouped in a number of different categories.

In this session you will:

✓ learn how to create a new colour category
✓ learn how to assign a colour category to a message
✓ learn how to assign a *Quick Click* category to a message
✓ learn how to find messages that have been assigned a colour category
✓ learn how to remove categories from messages
✓ learn how to delete a colour category.

CREATING A NEW COLOUR CATEGORY

You can use *colour categories* to quickly and easily identify and group together related Outlook items, such as email messages, contacts, tasks and appointments. The category colours appear prominently in views such as your Inbox, as well as within the open items themselves. In addition to the default colour categories provided by Outlook, you can create new categories as desired.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file Watsonia_08.pst...

1   Click on the *Harry Jones* message with the *RE: Thames* subject, then click on *Categorise* 🔲▾ in the *Tags* group to open the *Categorise* gallery

2   Select **All Categories** to open the *Colour Categories* dialog box

3   Click on **[New]** to open the *Add New Category* dialog box

4   Type **Thames** in *Name*, click on the drop arrow ▾ for *Colour* and select *Dark Maroon* (the bottom right colour in the colour swatch), then click on **[OK]**

Notice that the new Thames category has been added to the dialog box and it is ticked to show that it will be assigned to the selected message...

5   Click on **[OK]** to apply the *Thames* colour category to the selected message

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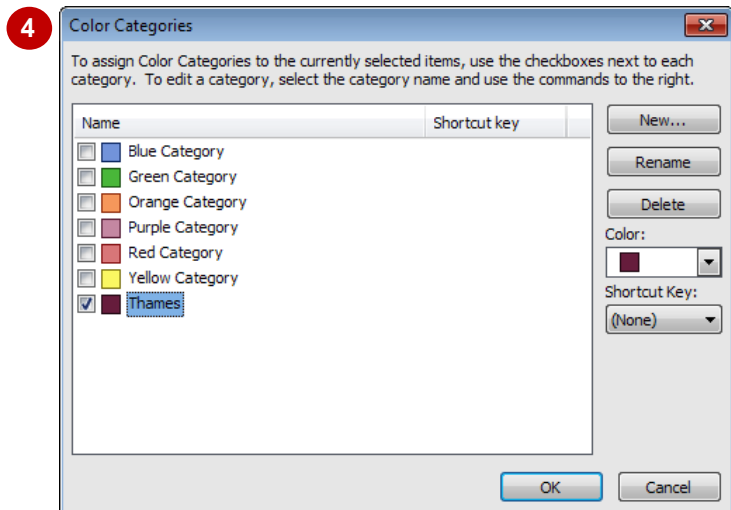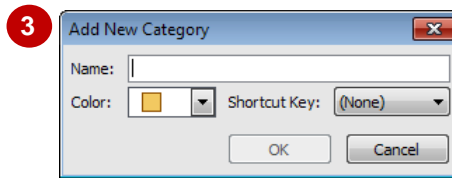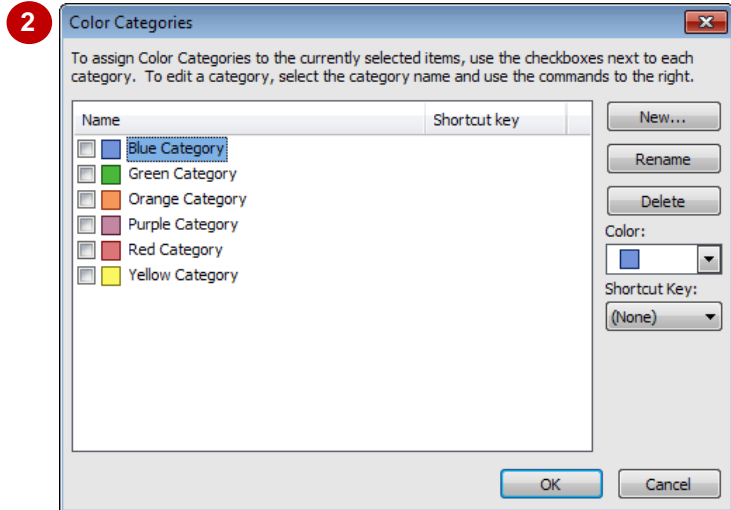
For Your Reference…

To *create* a *new colour category*:

1. Click on *Categorise* 🔲▾ in the *Tags* group
2. Select **All Categories**
3. Click on **[New]**
4. Type a *Name* and select a *Colour*
5. Click on **[OK]**

Handy to Know…

- If you like using keyboard shortcuts for functions, you can assign a keyboard shortcut to a new colour category while you are creating it.
- You can **[Rename]** the default colour categories to something more meaningful in the *Colour Categories* dialog box.

ASSIGNING A COLOUR CATEGORY

You can assign a colour category to different yet related Outlook items such as notes, meetings and messages that are, for example, associated with the same project. Because the colours are displayed prominently, it is very easy to identify and organise related items. You can assign a category individually, as a group, in an open item, in a view, plus more.

Try This Yourself:

Continue using the previous file with this exercise...

1 Type **Thames** in the *Instant Search* box to display all messages that refer to *Thames* in the message list

2 Select all messages except for the categorised one, then click on *Categorise* 🔳

The Thames colour category will appear in the gallery...

**3** Click on *Thames* to apply this colour category to the messages

A maroon icon will appear in the Categories columns. Let's assign a second category to some of the messages...

4 Click on *Close Search* ❌, then type **Thames+Amazon** in the *Instant Search* box

5 Repeat steps *2* and *3* to apply the **Yellow Category** as well

The first time that you assign a default colour category, you will be prompted to rename the category. For this exercise we'll keep the default values if you are prompted...

6 If the prompt for renaming the category displays, click on **[No]**
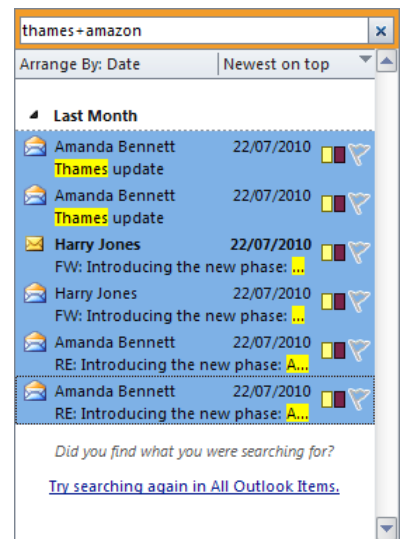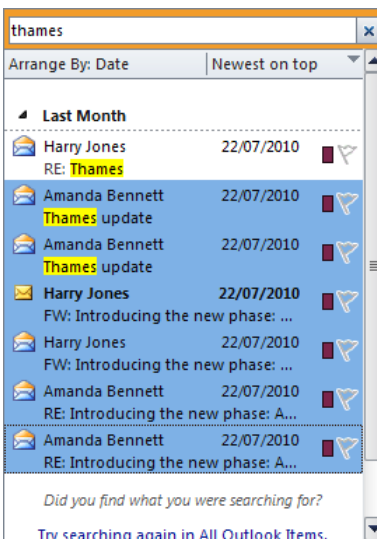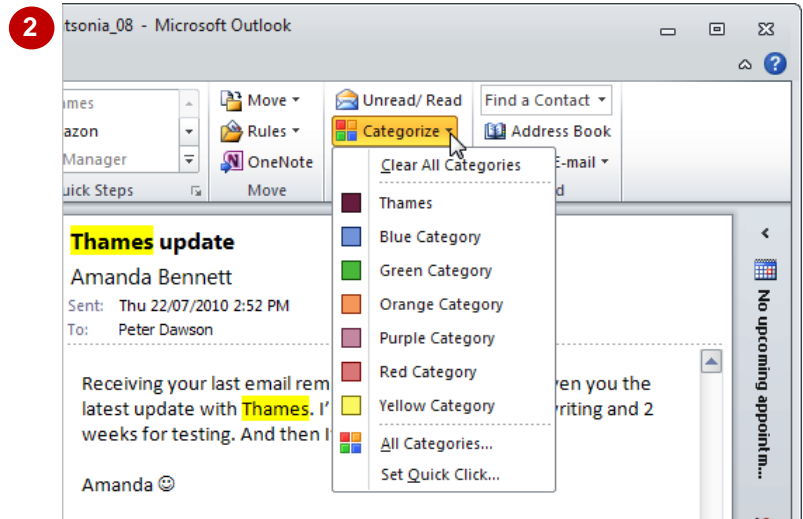
For Your Reference…

To *assign* a *colour category* to a message:

1. Select the desired message/s
2. Click on *Categorise* 🔳
3. Select the colour category

Handy to Know…

* Only the 15 most recently-used colour categories appear in the **Categorise** gallery. To see all colours, select **All Categories** to open the *Colour Categories* dialog box.

* The *Colour Categories* dialog box lets you assign multiple categories to an item at once by clicking on the desired checkboxes.

ASSIGNING A QUICK CLICK CATEGORY

You can assign a colour category to a message in a message list with a single click. When you click in the *Categories* column, you will select the default *Quick Click category*. The *Red*

Category is the default Quick Click category but you can easily change it. This can be helpful if you work mainly on one project or often categorise messages as 'Important', 'Review', and so on.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_08.pst...

1. If *Instant Search* is still active, click on *Close Search* 🗷

2. Click on the *Peter Dawson* message with the *Parking* subject

3. Press [Ctrl] and click on the *Amanda Bennett* message with the *Marketing budget* subject

4. Click in the *Categories* column next to either of the selected messages

    The default Red Category will be applied automatically to the two selected messages.

    If a colour category is not automatically applied to the messages, Quick Click hasn't been set up. To set it up, right-click on the Categories column and select Set Quick Click. Click on No Category, select Red Category and then click on [OK]
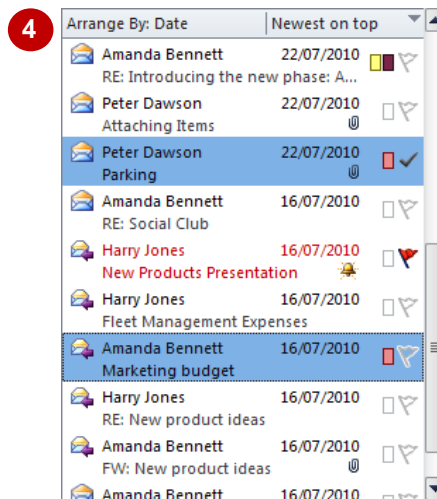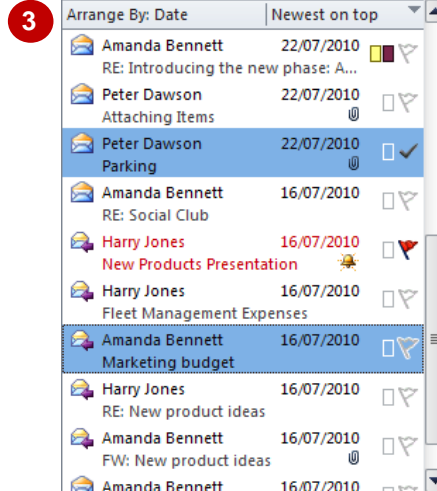
For Your Reference…

To **assign** a **Quick Click category**:

1. Select the message/s in a message list
2. Click in the **Categories** column for one of the selected messages

Handy to Know…

*   To change the default Quick Click category to a different category, click on *Categorise* 🔲▾, select **Set Quick Click**, change the colour as desired and click on **[OK]**. Note that if you change the Quick Click category, the colour category assigned to previously marked messages will not change.

FINDING MESSAGES WITH CATEGORIES

Using **Instant Search**, you can quickly and easily find all messages that have been assigned to one or more categories. Once you have initiated **Instant Search**, you can use a combination of the tools on the contextual tab, such as the **Categorised** ▦▾ tool, and logical operators, such as NOT, OR and so on, to find the desired messages.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Click in the **Instant Search** box

The Search Tools: Search contextual tab will open…

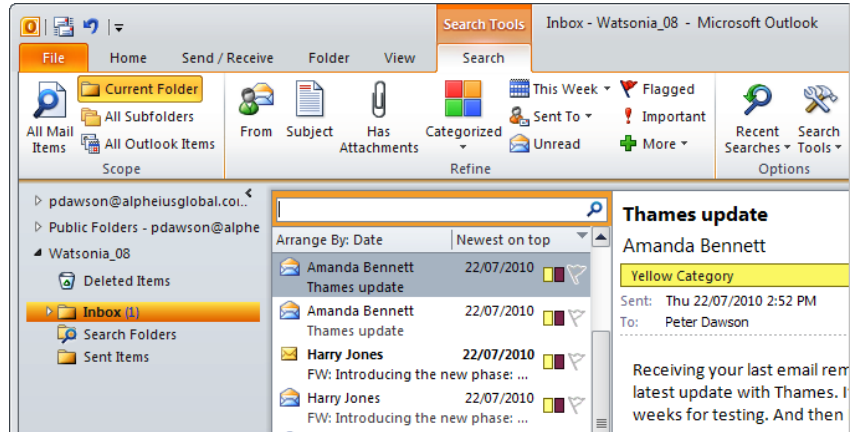**2** Click on **Categorised** ▦▾ to open the **Categorised** gallery and select **Thames**

Outlook will add the search criterion to the Instant Search box and will find all messages conforming to it.

*You can add a second category to find messages that have had two categories assigned to them…*

3 Repeat step **2** to select the **Yellow Category**

Now only messages with both categories applied will appear in the message list. Notice that you didn't have to specify the logical operator AND in this situation – it was implied…
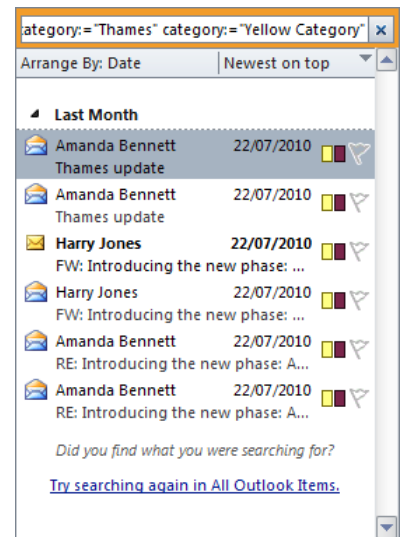
4 Click on **Close Search** ☒ to turn off the search facility

1
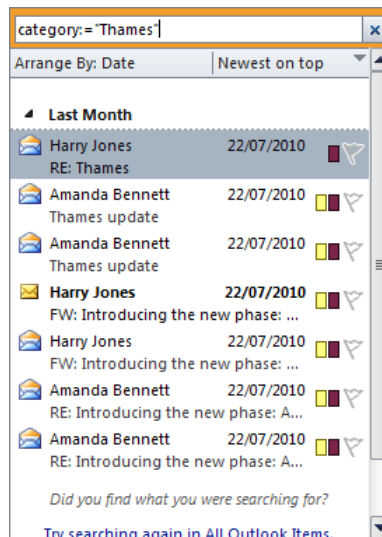
2

3

For Your Reference…

To find **messages** that have had one or more **colour categories** assigned to them:

1. Click in **Instant Search**
2. Click on **Categorised** ▦▾ and select the category
3. Repeat step **2** for each additional category

Handy to Know…

* You can display a list of all categorised messages by clicking in the **Instant Search** box, clicking on **Categorised** ▦▾ and selecting **Any Category**. You can then sort the list by clicking on the **View** tab and clicking on **Categories** ▦▾ in the **Arrangement** group.

REMOVING CATEGORIES FROM MESSAGES

If you realise that you have applied the wrong category to a message or perhaps you've simply applied a category to the wrong message, correcting the mistake is a breeze. You can remove a category from a message and then quickly apply the correct category to the correct message.

Try This Yourself:

Same File

*Continue using the previous file with this exercise, or open the file Watsonia_08.pst...*

1. Click on the **Peter Dawson** message with the **Parking** subject

2. Click on *Categorise* and select **Clear All Categories** to remove the **Red Category** from the message

   Let's remove one category from a message to which two categories have been assigned...

3. Click on the **Amanda Bennett** message with the **Thames update** subject, then click on *Categorise* and select **All Categories** to open the **Colour Categories** dialog box

4. Remove the tick from the **Yellow Category** checkbox, then click on **[OK]**

   Notice that the Maroon (Thames) category is still assigned to the message

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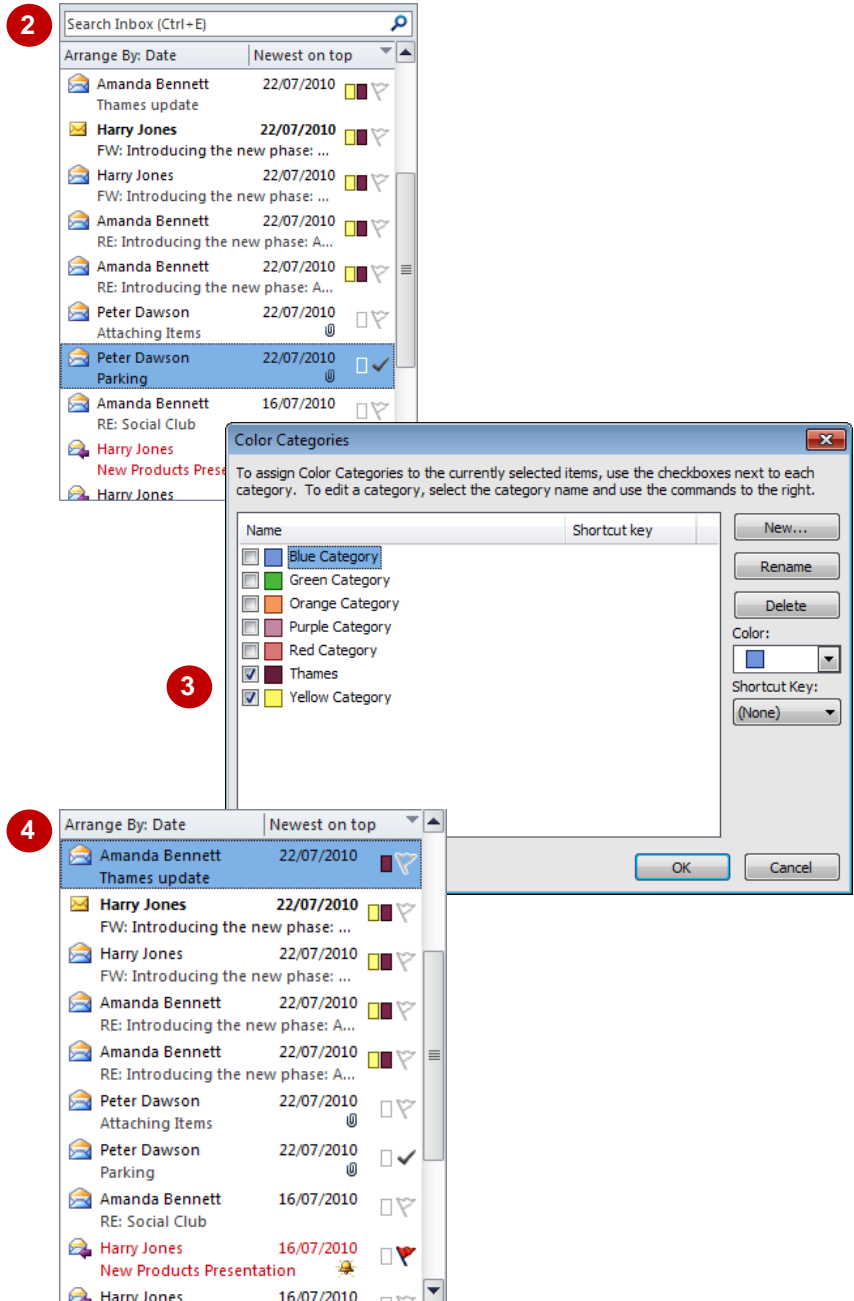
For Your Reference…

To **remove categories** from a **message**:
1. Select the message/s in a message list
2. Click on *Categorise*
3. Select **Clear All Categories** to remove all, or Select **All Categories** to remove specific categories when more than one is applied

Handy to Know…

- You can remove a colour category from an open message. To do this, click on *Categorise* and select **Clear All Categories** to remove all categories from the open message or select the category to remove only one category when more than one has been applied to the message.

DELETING A COLOUR CATEGORY

If you are no longer using a particular colour category, you can delete it from the category list. This means that you will no longer be able to assign the deleted category to items unless you

recreate it again. Although Outlook specifies that items that were previously marked with the deleted colour category will not be affected, this doesn't appear to be the case.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Click on an uncategorised message

2 Click on **Categorise** and select **All Categories** to open the **Colour Categories** dialog box

Let's delete the Thames category...

3 Click on the <u>word</u> **Thames** to select the category, then click on **[Delete]**

You will be asked to confirm your intention...

4 Click on **[Yes]** to delete the **Thames** category from the **Categorise** gallery, then click on **[OK]** to close the **Colour Categories** dialog box

As soon as you scroll through the message list or click on a message, the maroon colour category (Thames) that had previously been assigned to several messages will disappear. We think this is a bug as previously categorised items aren't supposed to be affected
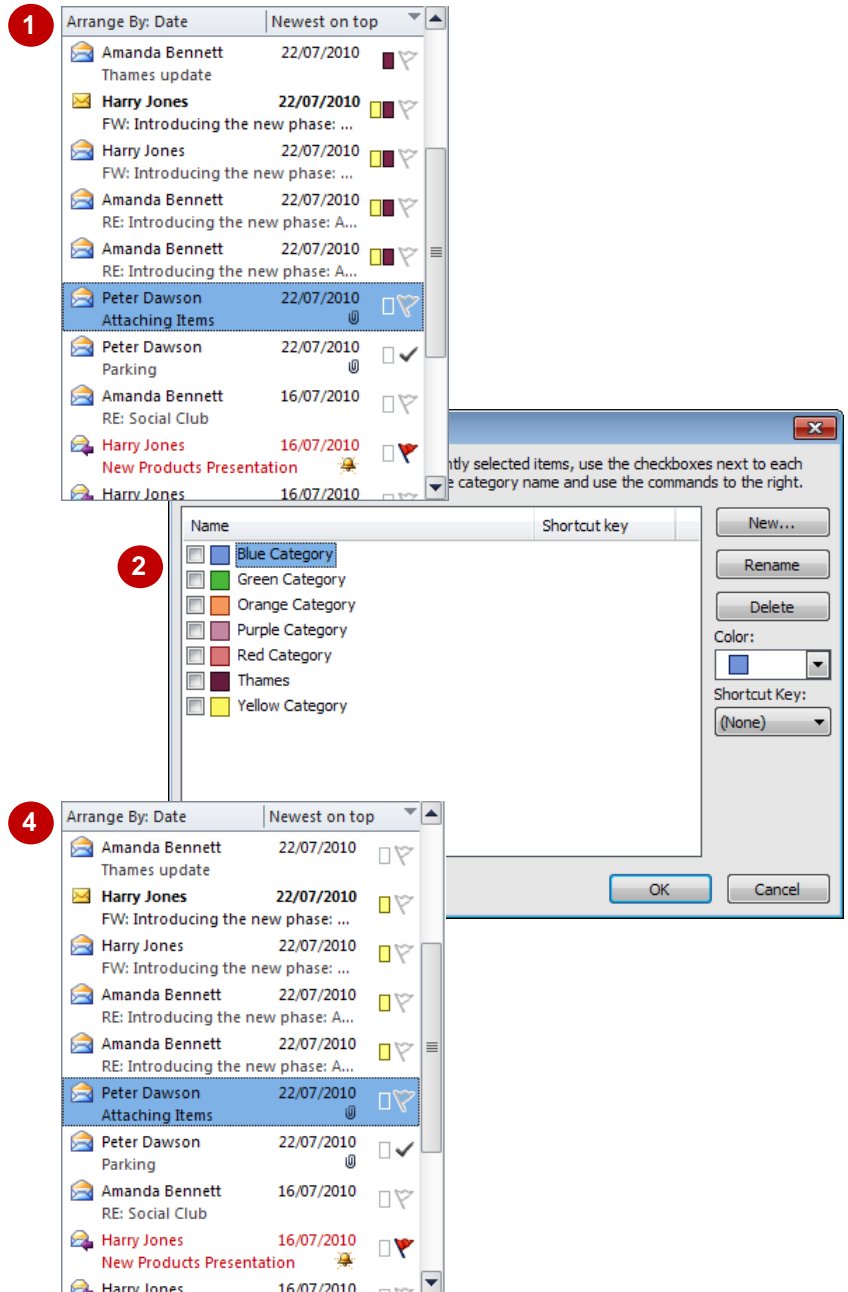
For Your Reference…

To *delete* a *colour category*:

1. Click on *Categorise* and select **All Categories**
2. Click on the Colour Category *Name*
3. Click on **[Delete]**
4. Click on **[Yes]** and then on **[OK]**

Handy to Know…

- You can change the colour of the categories using the *Colour Categories* dialog box. To do this, click on *Categorise* and select **All Categories**. Click on the Colour Category *Name*, select the desired *Colour* and click on **[OK]**. All items with that category will be updated.

NOTES: