

Microsoft Outlook 2013

Lesson 12

Categories and Outlook Data Files

Objectives

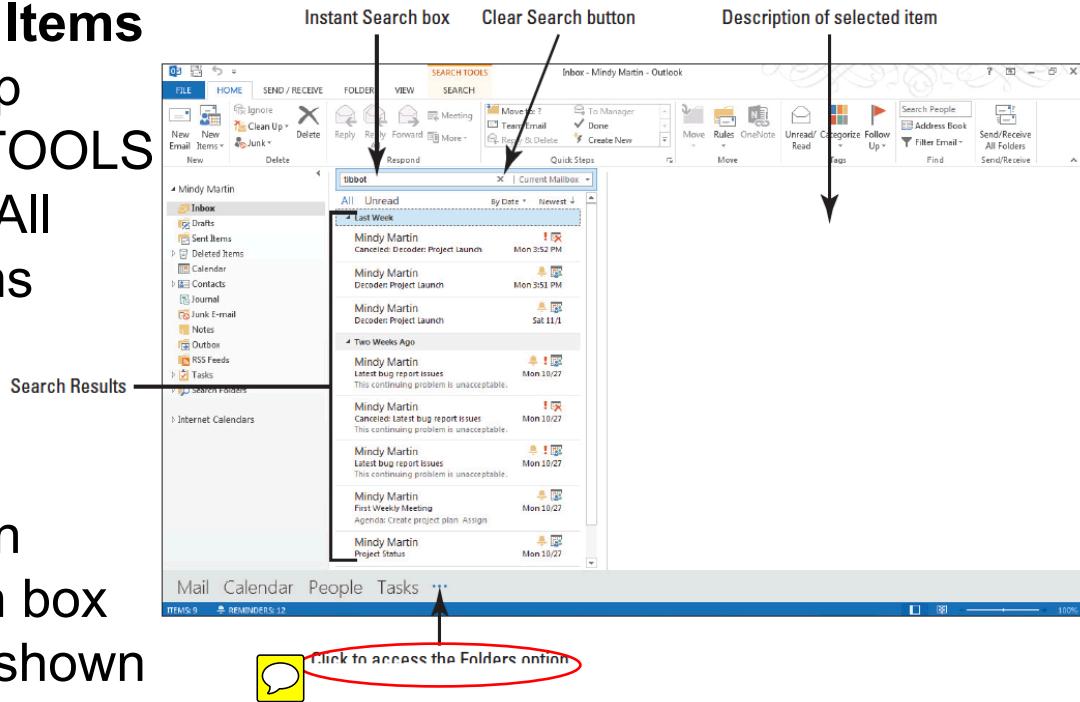
Skills	Exam Objective	Objective Number
Working with Categories	Apply categories	2.3.4
	Categorize calendar items	3.2.6
	Sort messages	2.3.1
	Use Advanced Find	1.4.6
Working with Data Files	Create data files	1.3.8

Step by Step: Categorize Outlook Items

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. Click the  icon in the Navigation bar to open the additional features and select **Folders** to expand the Folders Pane to show all of your folders. Click the **Inbox** in the Folders Pane.
 2. Click the **Instant Search** box. The **SEARCH TOOLS** tab appears in the Ribbon.
 3. In the Instant Search box, key **[the name of a friend or coworker that you sent mail items to in Lessons 9 or 10]**. Outlook 2013 displays a list of items related to your friend or coworker.

Step by Step: Categorize Outlook Items

4. Click **All Outlook Items** in the Scope group on the **SEARCH TOOLS** tab, if necessary. All Outlook 2013 items related to the friend or coworker whose name you keyed in the Instant Search box are displayed, as shown at right.



5. Click the first item on the list. Scroll to the end of the list. If necessary, click the **More** link at the bottom of the list.

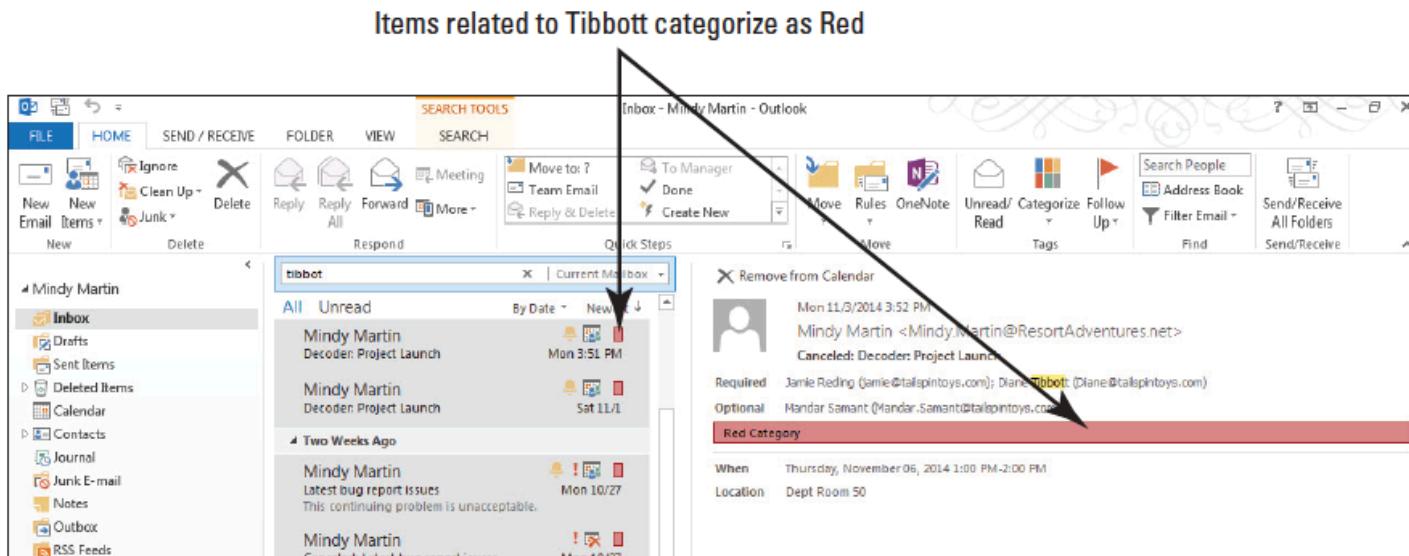
Step by Step: Categorize Outlook Items

6. [Press **Shift**] and simultaneously click the **last item** on the list. All the search results are selected.
7. Right-click ~~over~~ the highlighted list of items. On the shortcut menu, point to Categorize and click the **Red Category** option. If you have not used the Red Category before, a dialog box allowing you to rename the category is displayed, as shown below.



Step by Step: Categorize Outlook Items

8. Click **No** in the Rename Category dialog box. You will rename the category in the next exercise. All the items are assigned to the Red Category, as shown below.
 9. Click the **Close Search** button to clear the search criteria, which in this case is the name of your friend or coworker.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Modify Color Categories

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. Click the **Inbox** button in the Folders Pane to display the Mail folder. A preview of the first message appears in the Reading Pane. Though you do not have to open it, an Outlook 2013 item must be selected to activate the Categorize button.
 2. On the HOME tab, click the **Categorize** button in the Tags group and click the **All Categories** option from the drop-down list. The Color Categories dialog box is displayed.

Step by Step: Modify Color Categories

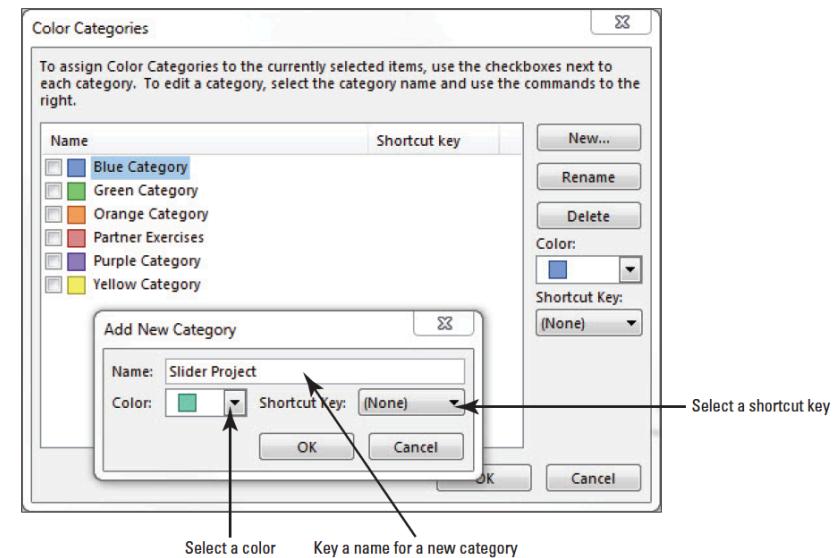
3. Click **Red Category** in the list of categories and click the **Rename** button on the right side of the dialog box. The Red Category text becomes active.
 4. Key **Partner Exercises** in the activated space and [press **Enter**].
 5. Click **OK** to rename the category and close the Color Categories dialog box.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Create New Color Categories

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. Click the **Inbox** button in the Folders Pane to display the Mail folder.
 2. To create a new category, click **Categorize** on the HOME tab and select the **All Categories** option. The Color Categories dialog box is displayed.
 3. Click the **New** button. The Add New Category dialog box is displayed.
 4. In the **Name** field, key **Slider Project**.

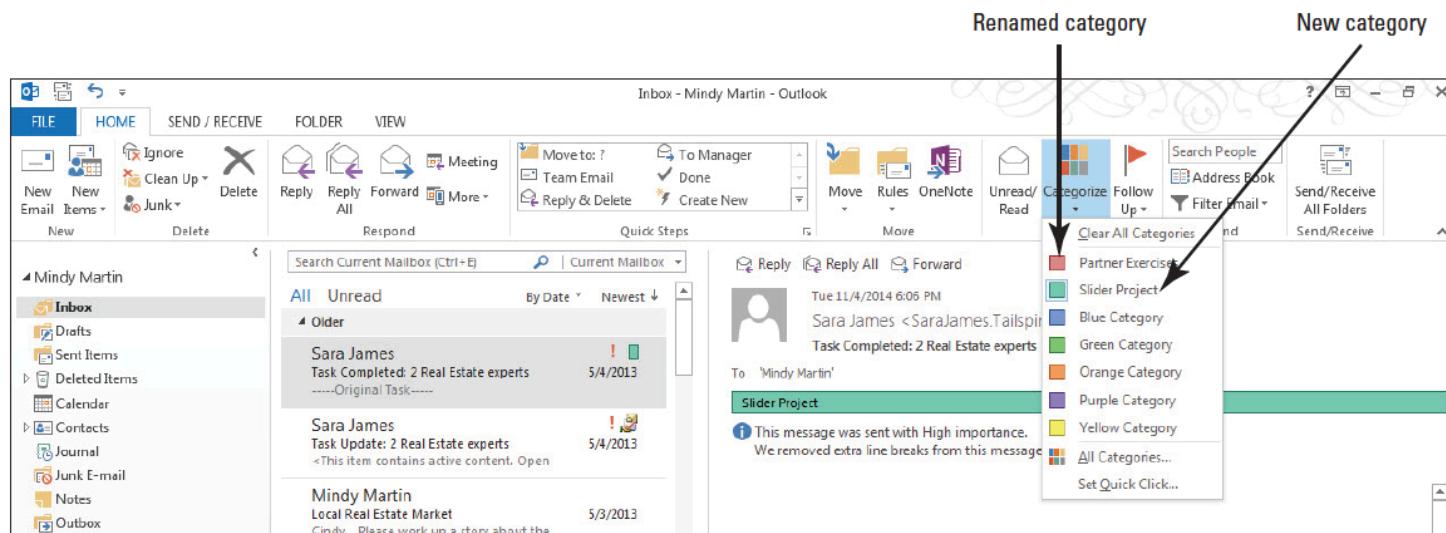
Step by Step: Create New Color Categories

5. In the **Color** field, select **Teal**, as shown at right. Click **OK**.
6. Click **OK**. The new category is displayed in the Color Categories dialog box. Because a message was selected when you created the new color category, the new category is applied to the selected message.



Step by Step: Create New Color Categories

7. Click the **Categorize** button on the HOME tab to view the modified list of categories, as shown below.
8. Select the message again, then click **Categorize** and select **Clear All Categories** to remove the category from this message.

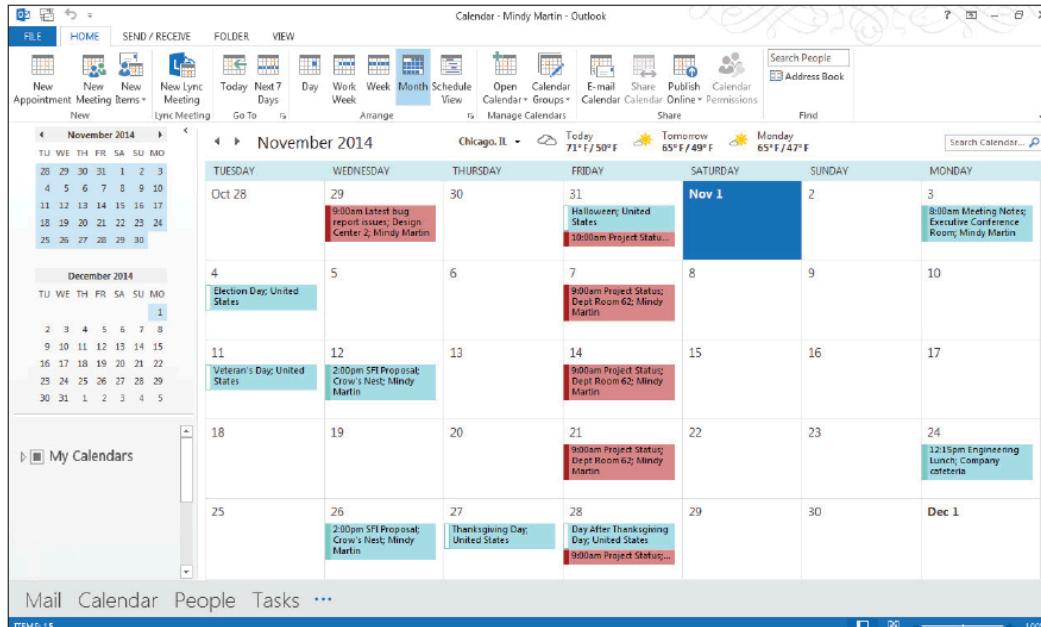


Step by Step: Create New Color Categories

9. Click the **Calendar** button in the Navigation bar to display the calendar.
10. Scroll ahead as needed and click on the next **Engineering Lunch appointment** that you created in Lesson 9.
11. Click the **Categorize** button on the Calendar Tools Appointment Series tab to display the available color categories.

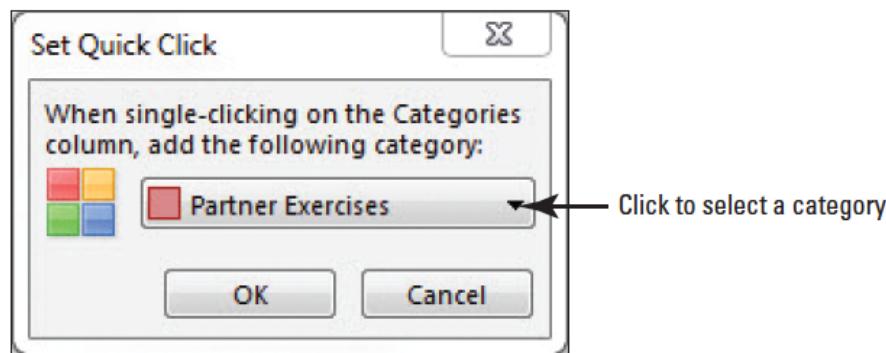
Step by Step: Create New Color Categories

12. Select the **Slider Project** category from the list. You should notice many categorized meetings and appointments, as shown below.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Set a Quick Click Category

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. If necessary, click the **Mail** button in the Navigation bar to display the Mail folder.
 2. Click the **Categorize** button in the Tags group on the HOME tab and select **Set Quick Click** to select a category that will be applied automatically when you click the category box on an Outlook 2013 item, as shown below.



Step by Step: Set a Quick Click Category

3. Click the drop arrow, select the **Green Category** option, and click **OK**. If you have not used the Green Category before, a message dialog box appears asking if you'd like to name it, as shown below.
 4. In the Name box, key **Holidays**. Click **Yes**.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

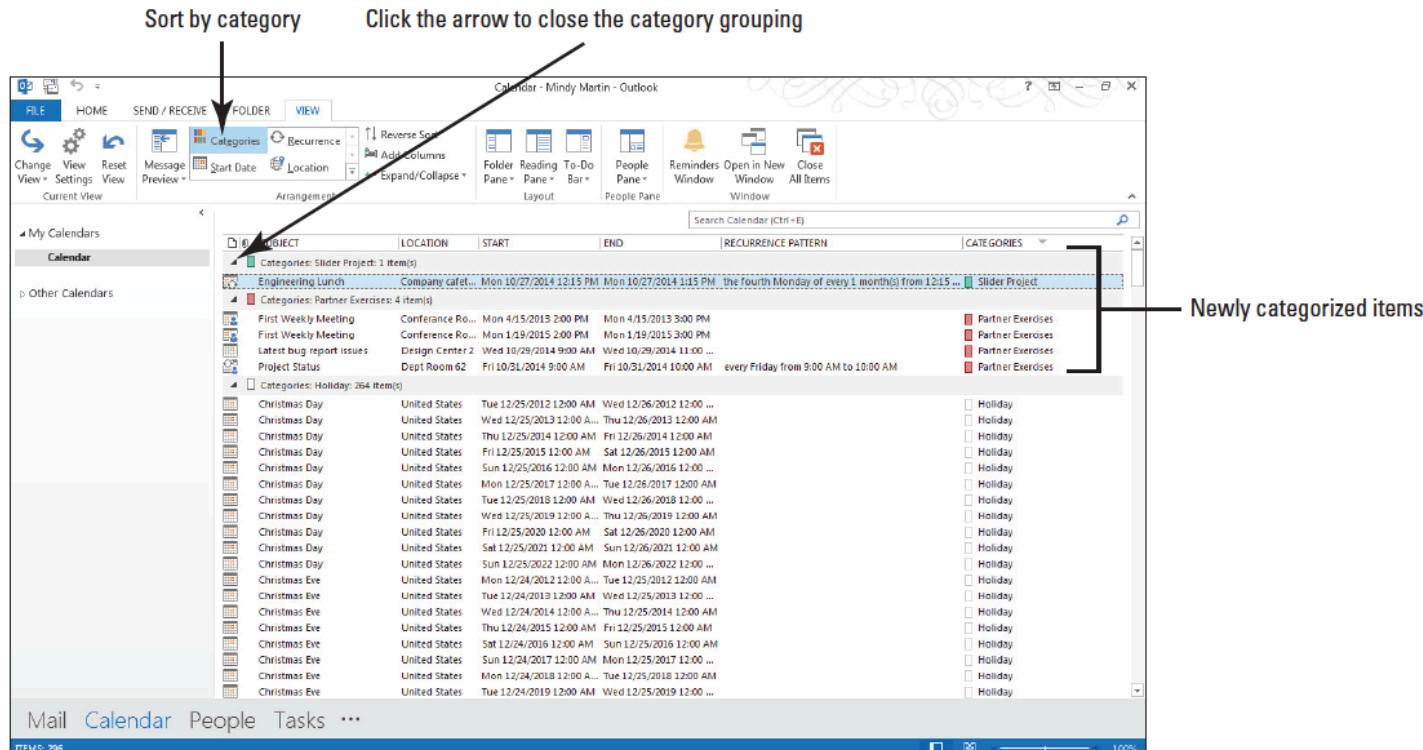


Step by Step: Sort Items by Color Category

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running and be sure to complete the previous exercises.
 1. If necessary, click the **Calendar** button in the Navigation bar to display the calendar.
 2. On the **VIEW** tab, click **Change View** in the Current View group and select the **List** option. The calendar items are displayed in a list.

Step by Step: Sort Items by Color Category

- Click the **Categories** option in the Arrangement group. The items are rearranged by category. Items without an assigned category appear at the bottom of the list, as shown below.



Step by Step: Sort Items by Color Category

4.  Double-click the **Category** box for the Holiday grouping. The grouping closes to hide the appointments.
5. On the VIEW tab, click **Change View** in the Current View group and select the **Calendar** option to restore the default view.
 - **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

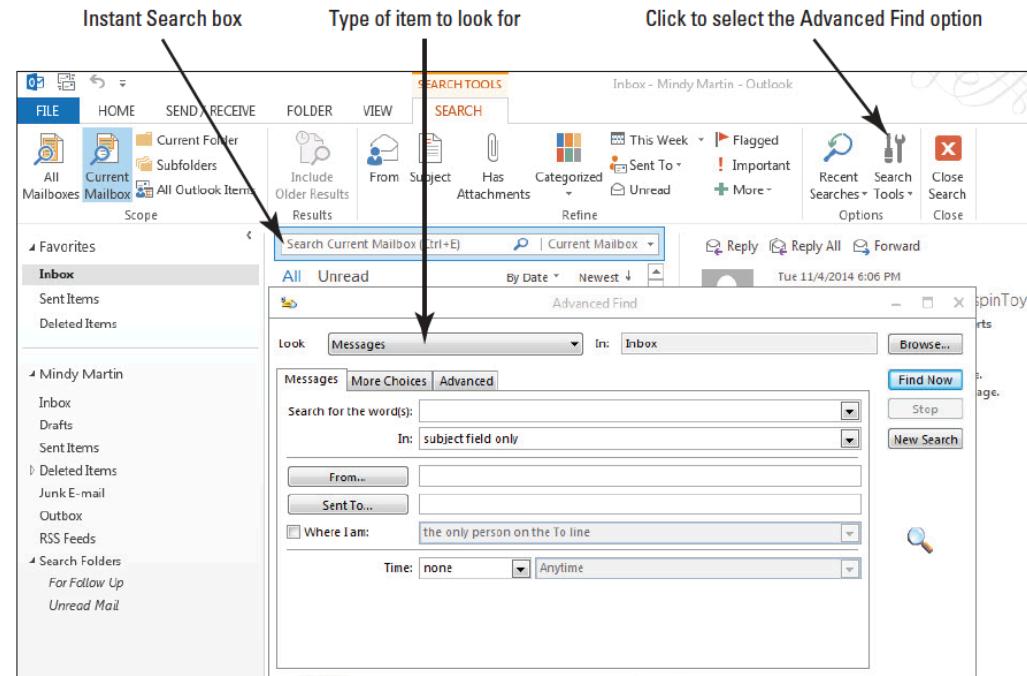
Step by Step: Search for Items with Categories

- **GET READY.** Before you begin these steps, complete the previous exercises in this lesson.
 1. Click the **Mail** button in the Navigation bar to display the Mailbox.
 2. Click in the **Instant Search box** to open the **SEARCH TOOLS** tab.

Step by Step: Search for Items with Categories

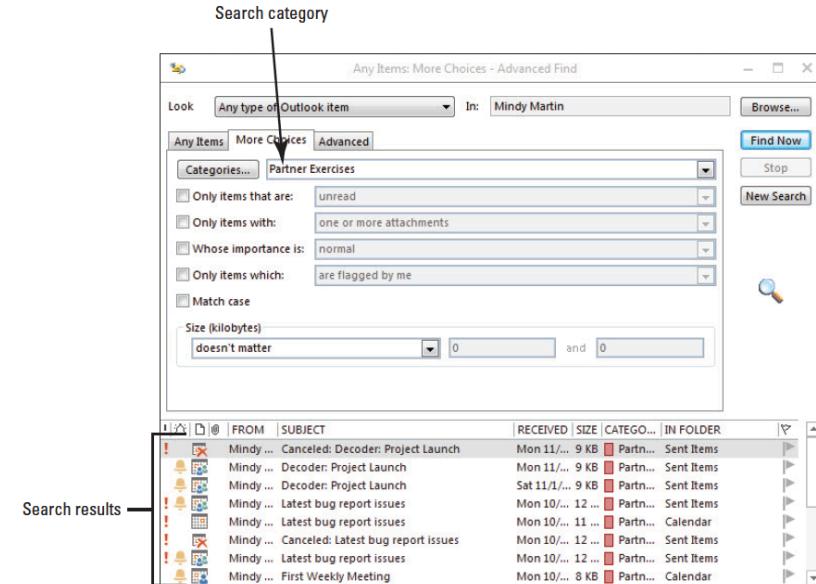
3. Click the **Search Tools** button in the Options group and click **Advanced Find** from the drop-down list that appears. The Advanced Find window is displayed, as shown at right.

4. Click the **More Choices** tab in the Advanced Find window.



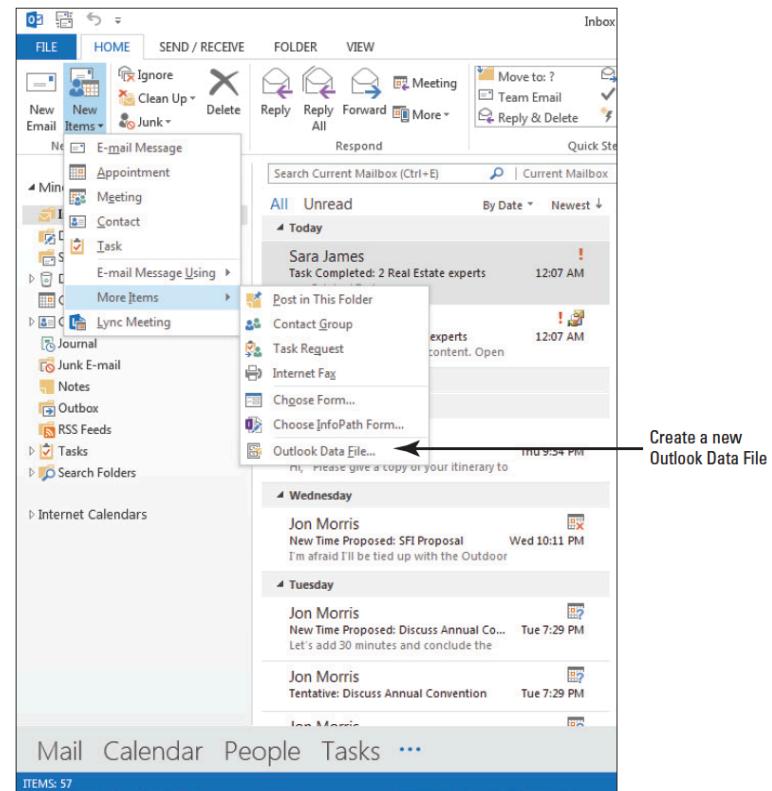
Step by Step: Search for Items with Categories

5. Click the **Categories** button and click the **Partner Exercises** check box. Click **OK** to close the Color Categories dialog box.
 6. Click **Find Now**. Search results are displayed at the bottom of the Advanced Find window as they are located, as shown at right.
 7. Click the **Close** button in the upper-right corner of the Advanced Find window.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



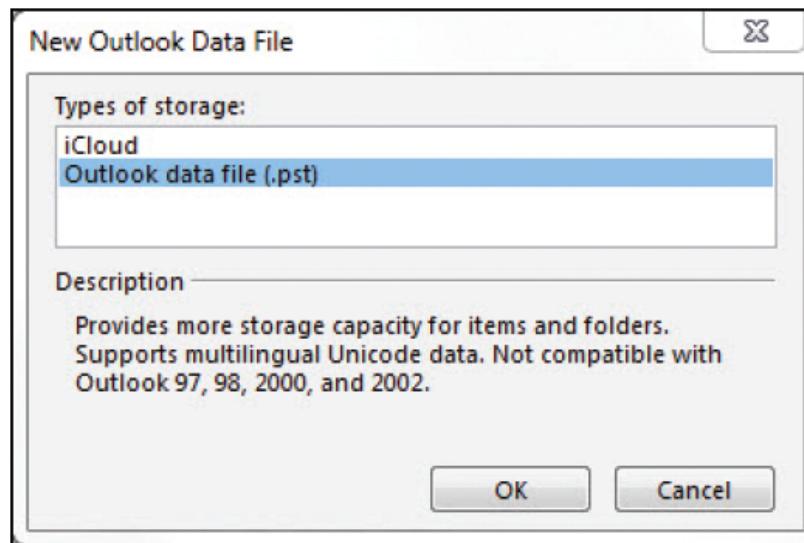
Step by Step: Create a Data File

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. Click the **Mail** button in the Navigation bar to display the mailbox.
 2. On the **HOME** tab, click **New Items** in the New group. A drop-down list of items that you can create is displayed.
 3. Click the **More Items** option to display the drop-down list of new items you can create, as shown at right.



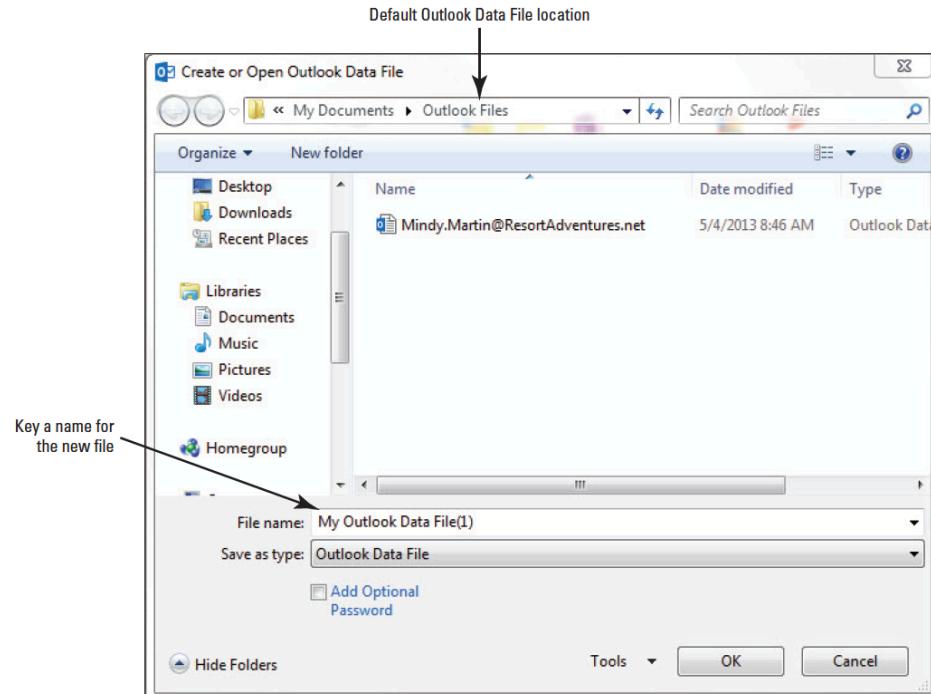
Step by Step: Create a Data File

4. Click **Outlook Data File** in the drop list. The New Outlook Data File dialog box is displayed, as shown below.



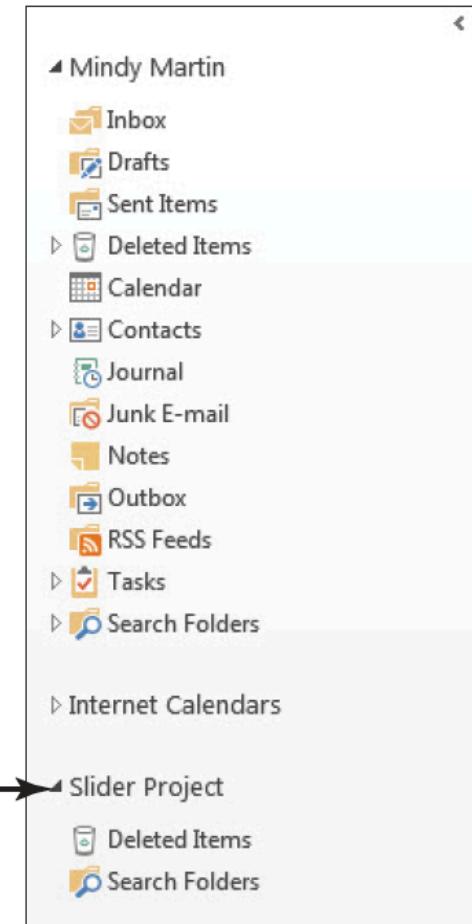
Step by Step: Create a Data File

5. Select **Outlook data file (.pst)** and click **OK**. The Create or Open Outlook Data File dialog box opens, as shown at right.
6. In the *File name* field, key **Slider Project** and click **OK**. A new **Slider Project.pst** file is created on your computer, and the new Slider data file appears in the Folders Pane.



Step by Step: Create a Data File

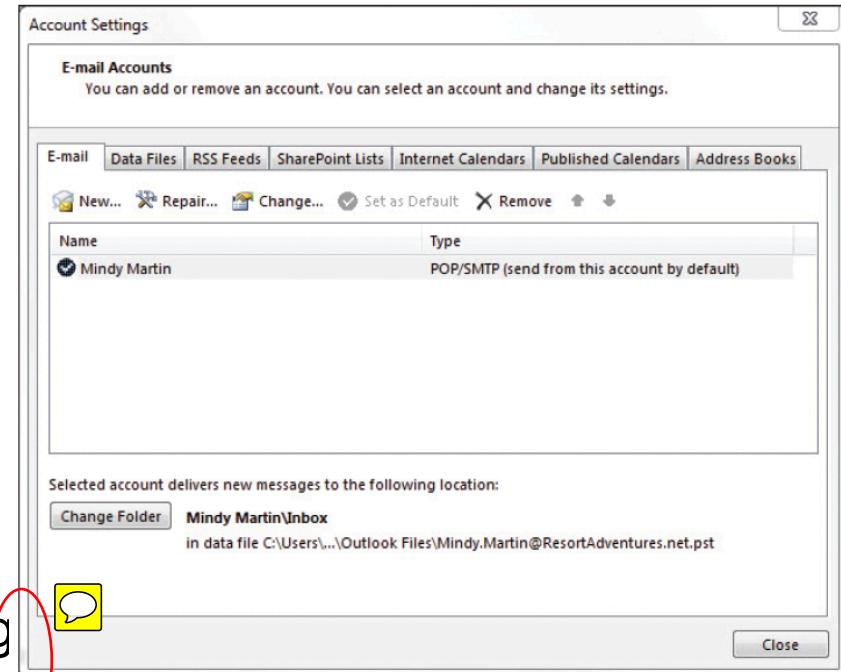
7. Click the **expand arrow** next to the Slider Project folder to display its contents, as shown at right.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Select a Data File for a Mail Account

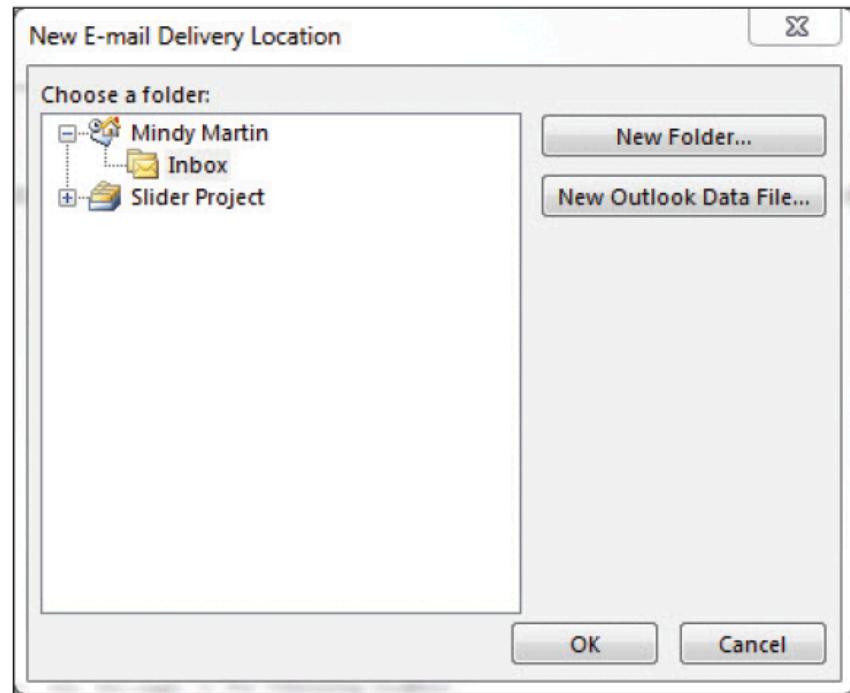
- **GET READY.** Before you begin these steps, complete the previous exercise.

1. Click the **FILE** tab to open Backstage view, and click the **Account Settings** option.
2. Select **Account Settings** from the drop-down menu. The Account Settings dialog box is displayed. Your email account is listed on the Email tab, as shown above. If you already receive messages from more than one email account, the additional accounts will also be displayed.



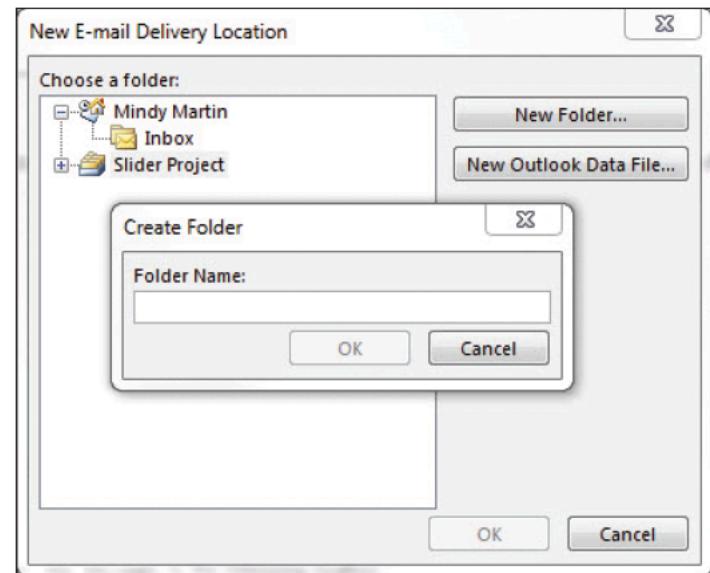
Step by Step: Select a Data File for a Mail Account

3. Click your main email account to select it and click the **Change Folder** button near the bottom of the dialog box. The New Email Delivery Location dialog box is displayed, as shown at right.



Step by Step: Select a Data File for a Mail Account

4. In the New Email Delivery Location dialog box, click the **Slider Project** folder. Click the **New Folder** button. The Create Folder dialog box is displayed, as shown at right.



Step by Step: Select a Data File for a Mail Account

5. In the Create Folder dialog box, key **Inbox** in the **Name** field and click **OK**.
6. In the New **Email** Delivery Location dialog box, click the **Inbox** folder you just created in the Slider Project folder. Click **OK**. In the Account Settings dialog box, you can see that mail will be delivered to **Slider Project.pst**.

7. Click the **Change Folder** button near the bottom of the dialog box. The New **Email** Delivery Location dialog box is displayed.

Step by Step: Select a Data File for a Mail Account

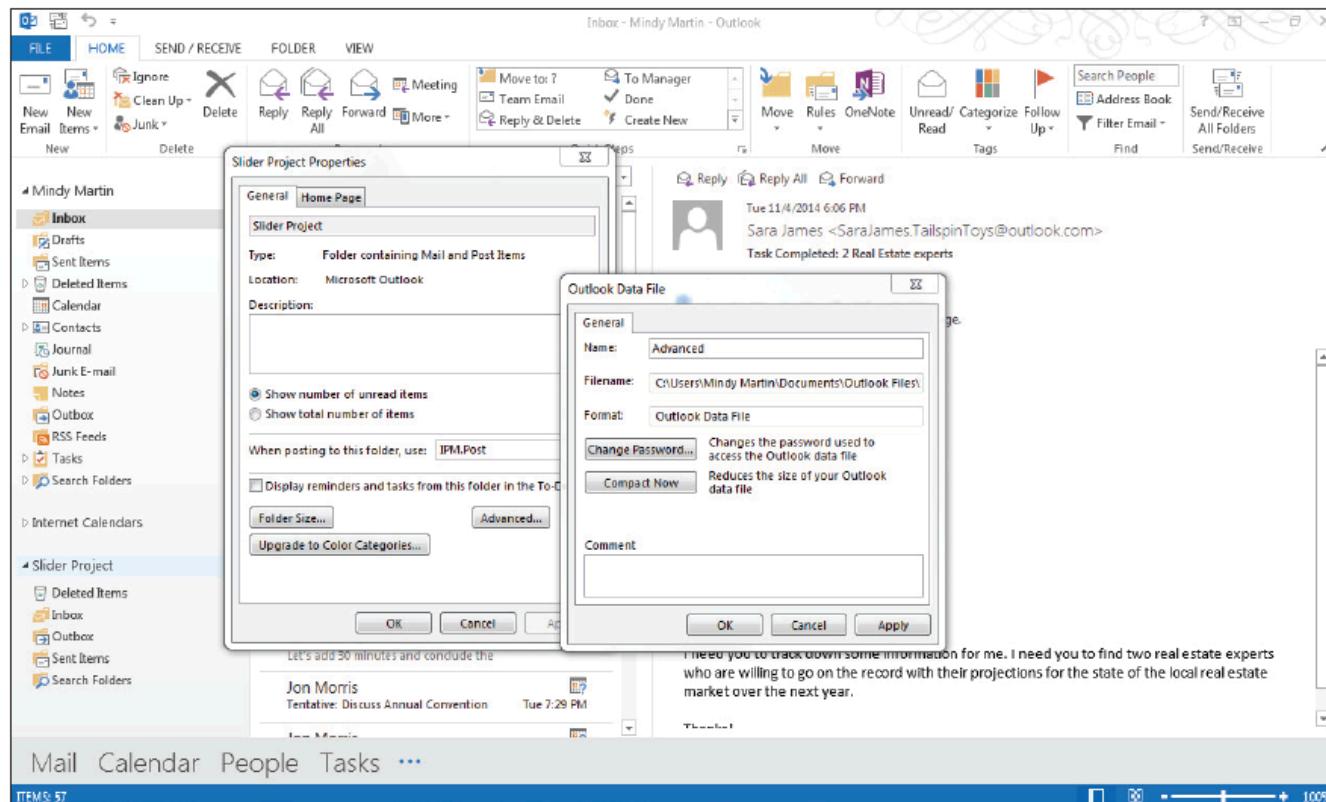
8. In the New Email Delivery Location dialog box, click the **plus sign (+)** next to your default Outlook Data File folder and then click the **Inbox** folder in the Outlook Data File folder. Click **OK**. This returns Outlook 2013 to your original data file settings. In the Account Settings dialog box, you can see that mail will be delivered to the original location.
 9. Click the **Close** button to close the Account Settings dialog box.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Change Data File Settings

- **GET READY.** Before you begin these steps, complete the previous exercise.
 1. If necessary, click the **Mail** button in the Navigation bar to display the Mail folder.
 2. Right-click on the **Slider Project** folder and click **Data File Properties** in the shortcut menu.

Step by Step: Change Data File Settings

- Click the **Advanced** button. The Outlook Data File dialog box is displayed, as shown below.



Step by Step: Change Data File Settings

4. Click the **Compact Now** button. A small dialog box shows you the progress.
 5. Click the **Name** field and key **New Slider Project**. Click **OK**.
 6. Click the **OK** button to close the New Slider Project Properties dialog box.
- **CLOSE** Outlook 2013.

Skill Summary

Skills	Exam Objective	Objective Number
Working with Categories	Apply categories	2.3.4
	Categorize calendar items	3.2.6
	Sort messages	2.3.1
	Use Advanced Find	1.4.6
Working with Data Files	Create data files	1.3.8