Creating Rules in Outlook

Overview

Microsoft Outlook provides a way for users to manage and organize their email using rules. A rule is a condition or action set by the user to organize mail messages either sent or received by the user. For example, rules can be applied to save messages from a distribution list to a specific folder or to move messages with certain subject words into a folder. This document explains how to create rules with all versions of Microsoft Outlook: 2003, 2007, 2010, and 2013.
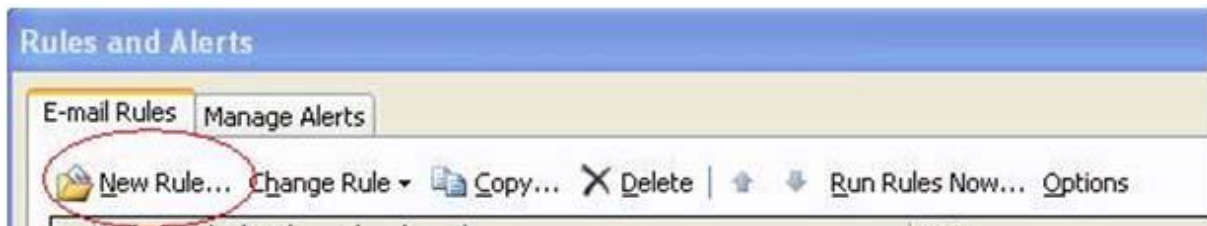
To create a rule, launch Outlook. You must be viewing mail to configure rules.

<u>Outlook 2003 & 2007</u>

1. From the menu, select Tools, and then select Rules and Alerts.
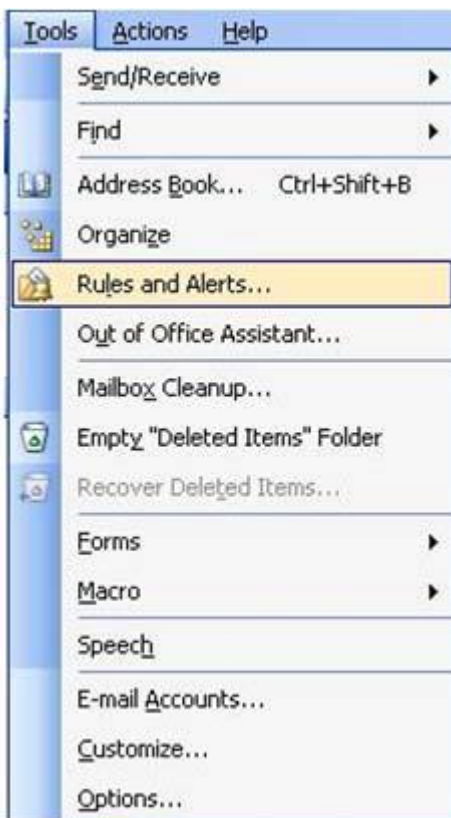
2. Click on the New Rule button. Proceed to step 3 below.

Outlook 2010 & 2013

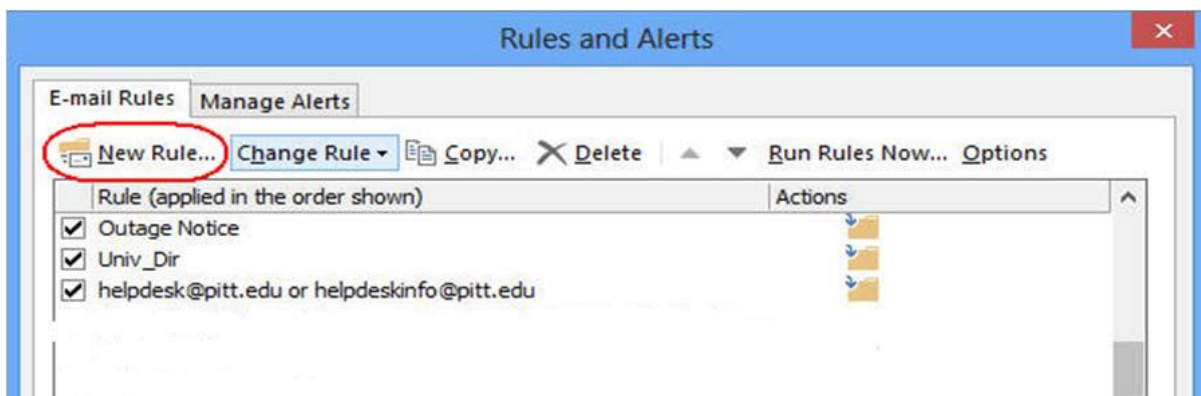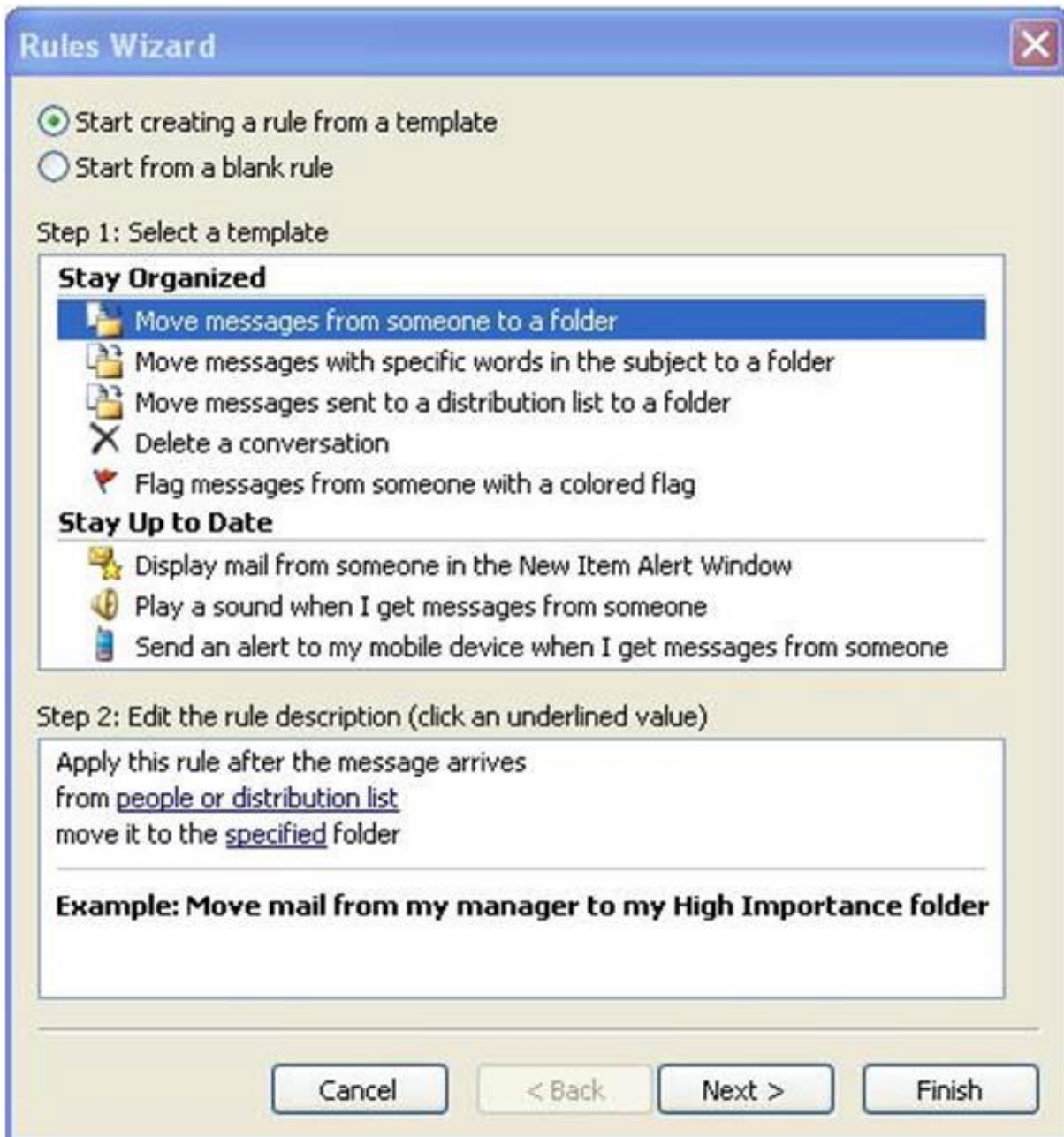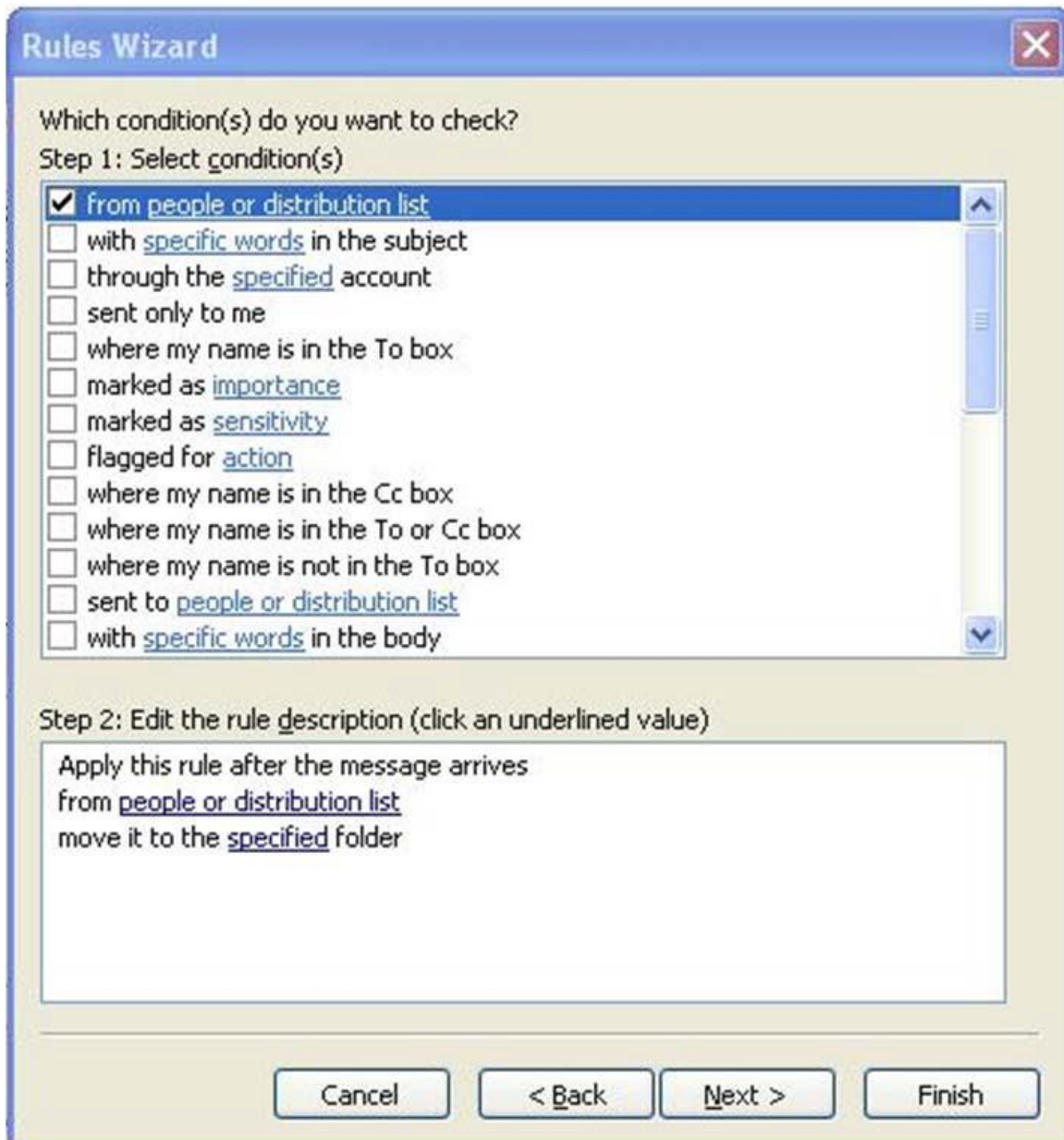1. From the File tab, click Manage Rules & Alerts.

2. Click **New Rule**

3. The Rules Wizard will appear on the screen. The rule can either be created from a generic template or from a blank rule. To create a rule to place messages from someone into a particular folder, select the first template listed under Stay Organized and click Next. This document will explain the process when using a template.

Rules Wizard

◉ Start creating a rule from a template
○ Start from a blank rule

Step 1: Select a template

Stay Organized
Move messages from someone to a folder
Move messages with specific words in the subject to a folder
Move messages sent to a distribution list to a folder
Delete a conversation
Flag messages from someone with a colored flag
Stay Up to Date
Display mail from someone in the New Item Alert Window
Play a sound when I get messages from someone
Send an alert to my mobile device when I get messages from someone

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from people or distribution list
move it to the specified folder

Example: Move mail from my manager to my High Importance folder
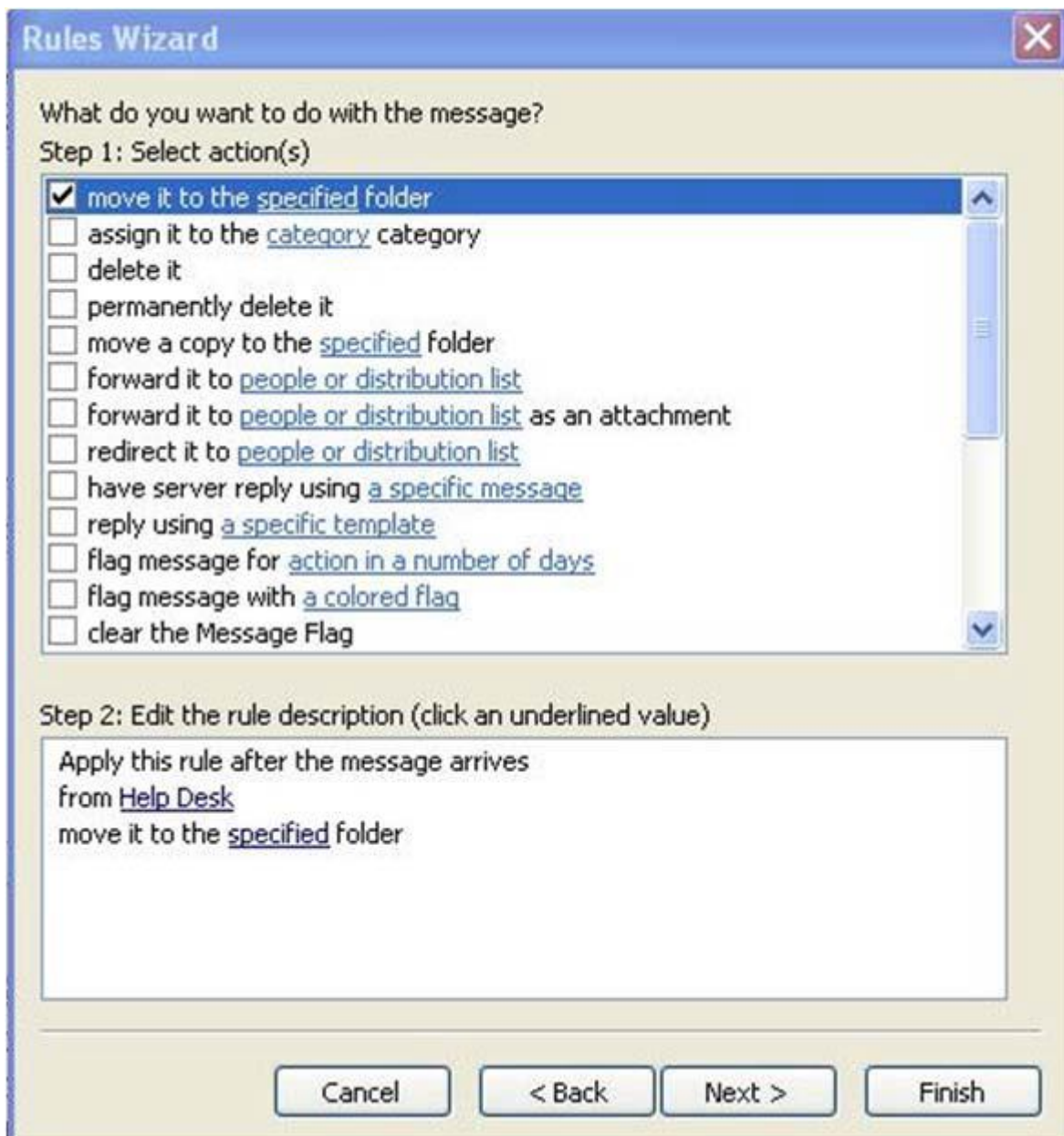
Cancel   < Back   Next >   Finish

4. In step 1, select all the conditions that apply to your rule by clicking the boxes next to each condition. The condition can be as simple as marking all messages from someone, or as complex as marking only messages from someone with a particular word in the subject. In Step 2, click on the underlined words to specify the conditions you selected in step 1.

Rules Wizard

Which condition(s) do you want to check?
Step 1: Select condition(s)

- ☑ from people or distribution list
- ☐ with specific words in the subject
- ☐ through the specified account
- ☐ sent only to me
- ☐ where my name is in the To box
- ☐ marked as importance
- ☐ marked as sensitivity
- ☐ flagged for action
- ☐ where my name is in the Cc box
- ☐ where my name is in the To or Cc box
- ☐ where my name is not in the To box
- ☐ sent to people or distribution list
- ☐ with specific words in the body

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from people or distribution list
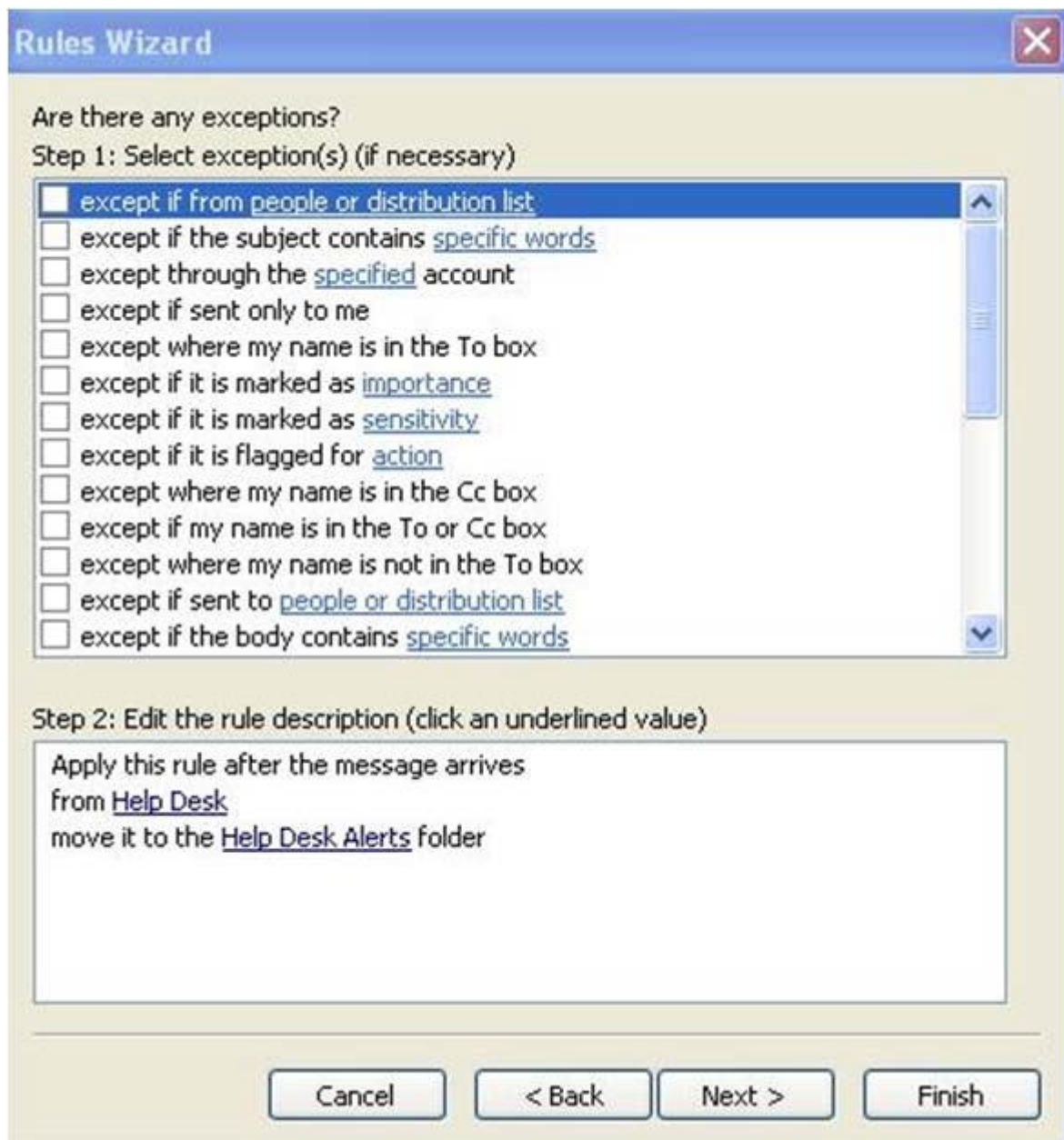move it to the specified folder

Cancel   < Back   Next >   Finish

5. When you click on an underlined word in Step 2, an additional window will display that allows you to specify the condition.For example, if you click on people or distribution list in the example above, you will select a person or distribution list from either the Global Address List (GAL) or your Contacts list.

Rule Address

Type Name or Select from List:　　　Show Names from the:

Global Address List

Name	Business Phone	Office
UCIS - ASC Group		
UCIS - Cenad Group		
UCIS - CLAS Group		
UCIS - CWES Group		
UCIS - NRP Group		
UCIS - PGSIS Group		
UCIS - Posvar Hall Group		
UCIS - REES Group		
UCIS - SAO Group		
UCIS and Affiliated Staff		
UCIS Directors		

From ->

Advanced ▼　　　OK　　　Cancel

6. Next, select the action for the rule. Actions can include moving the message to a folder, forwarding the message to another recipient, or deleting the message. In Step 1, put a checkmark by all actions that will apply to the rule that is being created.In Step 2, click on the underlined phrase, and select the value that is appropriate for the rule. For example, if the message is to be moved to a folder, select the folder's name from the list or create a new folder. Click Next after you have selected your actions.

Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- ☑ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or distribution list
- ☐ forward it to people or distribution list as an attachment
- ☐ redirect it to people or distribution list
- ☐ have server reply using a specific message
- ☐ reply using a specific template
- ☐ flag message for action in a number of days
- ☐ flag message with a colored flag
- ☐ clear the Message Flag

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from Help Desk
move it to the specified folder

[Cancel] [< Back] [Next >] [Finish]

7. Apply any exceptions to the rule. For example, you may want to move all emails from John Doe to the JDoe folder with an exception for those that are flagged as important. Click Next after you have selected your exceptions.

Rules Wizard

Are there any exceptions?
Step 1: Select exception(s) (if necessary)

- [ ] except if from people or distribution list
- [ ] except if the subject contains specific words
- [ ] except through the specified account
- [ ] except if sent only to me
- [ ] except where my name is in the To box
- [ ] except if it is marked as importance
- [ ] except if it is marked as sensitivity
- [ ] except if it is flagged for action
- [ ] except where my name is in the Cc box
- [ ] except if my name is in the To or Cc box
- [ ] except where my name is not in the To box
- [ ] except if sent to people or distribution list
- [ ] except if the body contains specific words

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from Help Desk
move it to the Help Desk Alerts folder

Cancel   < Back   Next >   Finish

8. Next, name the rule, turn it on, and review the rule description. Click Finish to save the new rule.
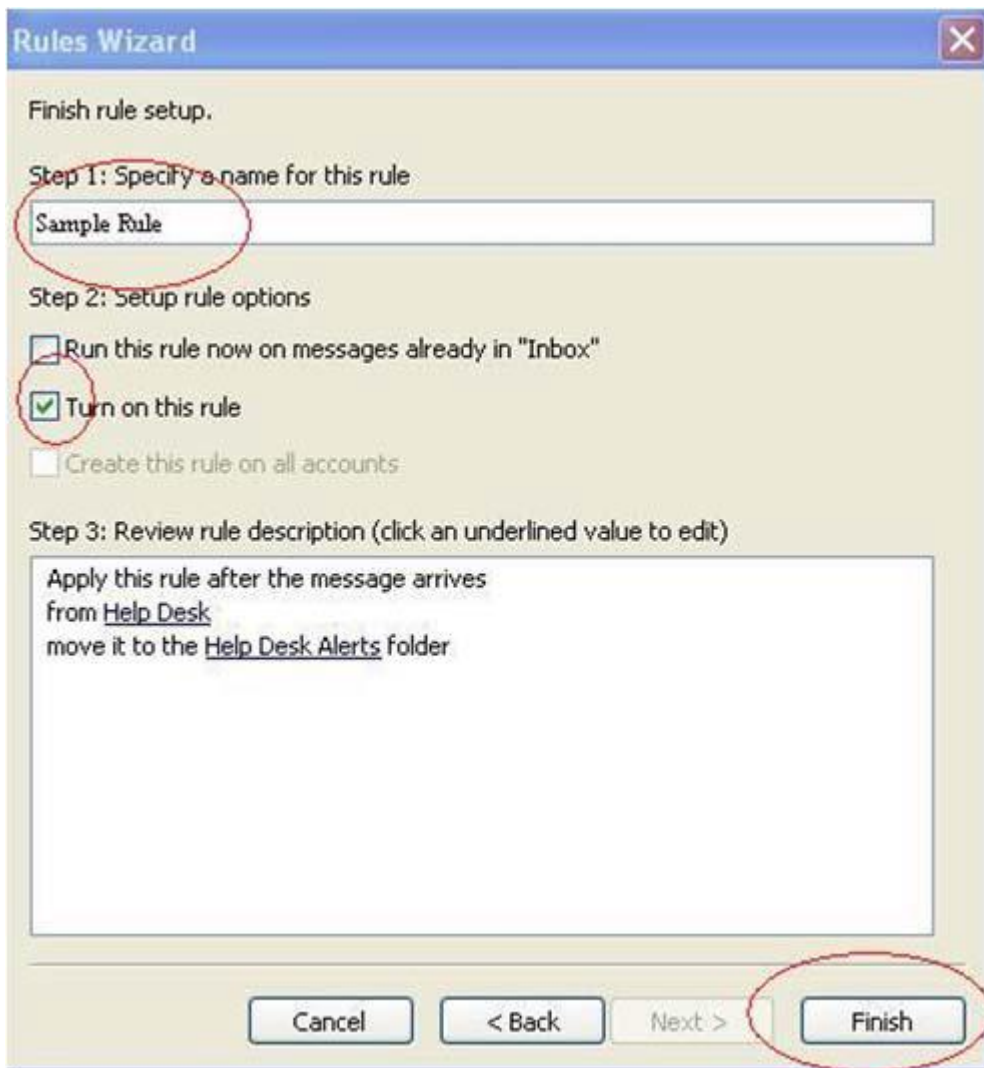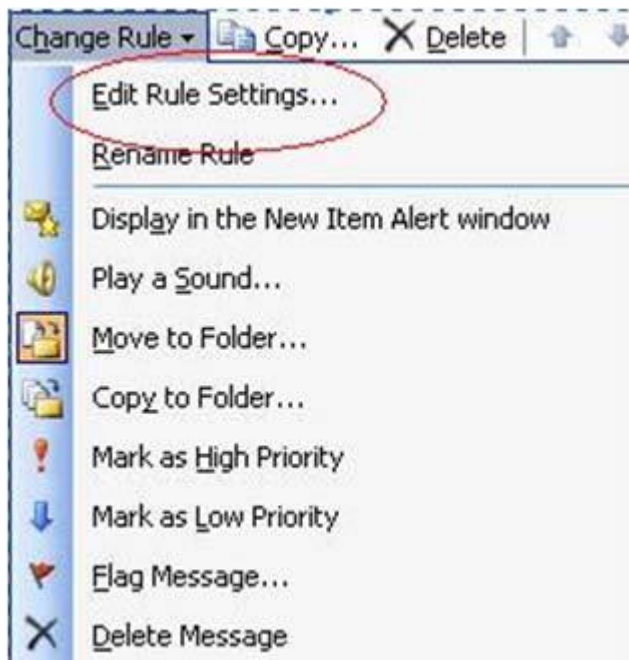
Edit or Delete Rules

Outlook 2003 & 2007

1. Select Change Rule to edit a rule or Delete to delete a rule.

2. If you choose Change Rule, select Edit Rule Settings to change the way your rule works.

Outlook 2010 & 2013

1. From the File tab, click Manage Rules & Alerts.

Note: When changing rules, the settings that will appear are identical to the settings for creating a rule.

Export or Import Rules (All Versions of Outlook)

1. Rules can also be exported to a file for backup purposes or imported from a previous backup. When the **Rules and Alerts** window is open, click on the **Options** button.
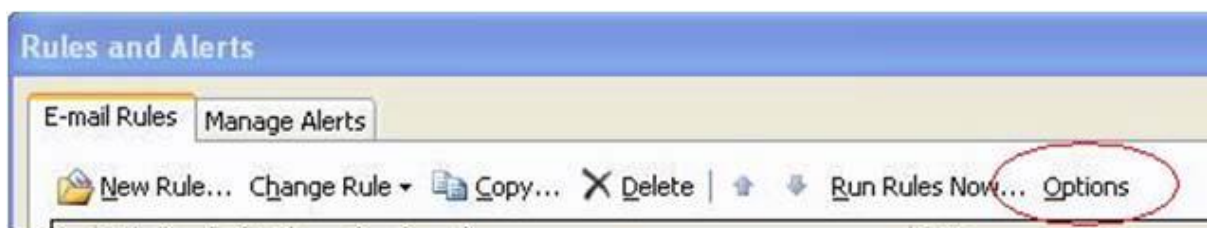
2. Choose Export Rules to create a backup or to move rules to a new computer. Choose Import Rules to restore the rules as a backup or to a new computer.

Questions and Feedback

The IT Help Desk at **+(256) 414 531343/437** is available 8 hours a day from 9AM-5PM, five days a week to answer your technology related questions. Questions can also be submitted via email at **helpme@dicts.mak.ac.ug**