

## Outlook Rules

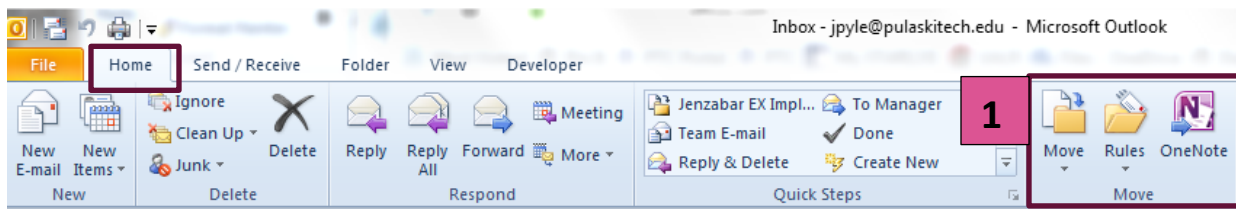
The Rules tool in Outlook allows you to take the same action for email with similar attributes. The primary focus of Rules is on organization and notification. For example, if you regularly move newsletters to a folder to read later, you can set a rule to file those newsletters in a predetermined folder for viewing later. The files never show up in your inbox. If you would like to be notified by an alert sound when your boss sends you an email, you can set up a rule to do just that. Outlook includes a few commonly used rules built for you, but you can also create your own by following the prompts.

Other examples:

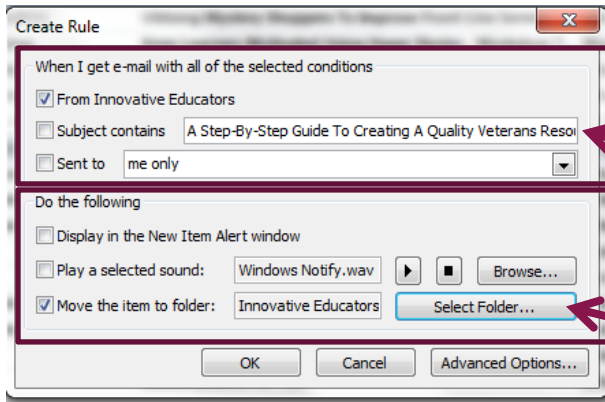
- Move email from certain people or groups to a folder of your choice
- Move email with specific words in the subject line to a specified folder
- Play a sound when you get email from a particular person
- Flag email for follow-up when it comes from certain people

### Demonstration: Creating a Rule

For this demonstration, I want to create a rule to move all email from Innovative Educators to a new folder of the same name. Why do I want to do this? I want to save them to read later, but I do not want them cluttering up my mailbox.



1. In Outlook, click on Rules, in the Move section, under the Home tab (see above).
2. Click "Create Rule" in the pop-up menu. Outlook assumes you are creating a rule for the message you are currently reading or that is active. Because I have the email from Innovative Educators selected, the Create Rule box includes information specifically from this email (see next page).
  - a. The first part of the rule asks you to identify the conditions, such as when the email is from a particular person, the subject contains a particular word or phrase, or when the email is to a specific recipient. In this case, I selected to apply this rule to all email from Innovative Educators.
  - b. The second part of the rule focuses on the action you want to happen to the email specified in the first part. I want to have email from Innovative Educators moved from the inbox to a folder named Innovative Educators, so I will check the box in front of the "Move the item to folder:" option.
  - c. Click the "Select Folder" button to select an existing folder or create a new folder.



Outlook assumes you are creating a rule for the message you are currently reading or that is active. The information displayed in this box will change accordingly. Click Cancel and select a different email to compare the changes.

You can create a new folder or select an existing folder when you click "Select Folder."

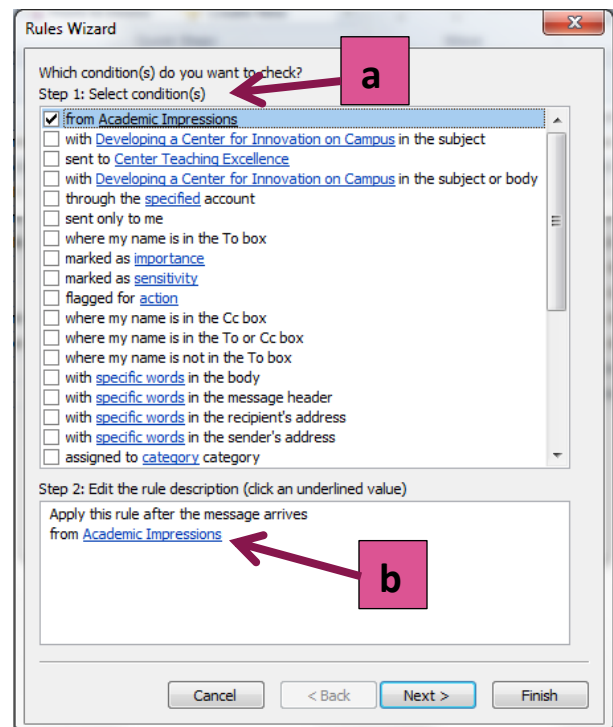
3. Once the rule is created, you get an option to apply the rule to all email in the inbox. I chose it and every email from Innovative educators went to the new folder I created. Now, I can look at these messages when I have time or when I want to search for new webinars.

### Advanced Options

In Step 2, above, you can select the "Advanced Options" button to get a wider variety of options for your rule. I selected another email, this one from Academic Impressions, and I was presented with a long list of options for selecting the conditions.

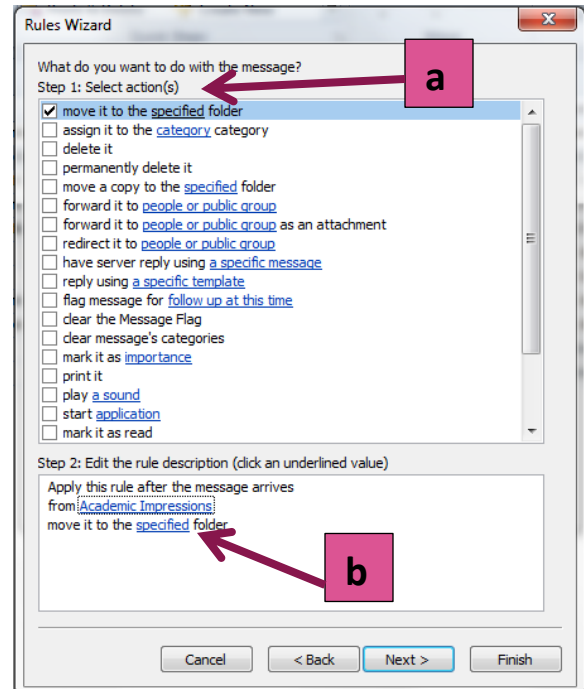
#### 1. Select a Condition

- a. Select the conditions you wish to apply to this rule. In this case, I selected the top checkbox under "Step 1: Select condition(s)," because I want the rule to apply to all email from Academic Impressions.
- b. The conditions show up in the box under "Step 2: Edit the rule description." Depending on which conditions you select, you may need to provide additional information. For example, if you chose one of the "with specified words" options, you would provide the words by clicking on a link in this box. An example of this is in the next step below.
- c. Click the "Next" button after you have made your selections and customized them.

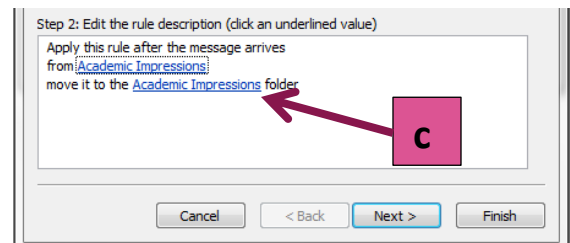


**2. Select an Action**

- a. The next dialog box to pop up is for selecting actions to apply to the selected email. I want to move email from Academic Impressions to a folder, to view later. When I selected this box, the information in the box under Step 2 asks me to provide additional information.
- b. To do this, I simply click on the bottom blue link in the box, to specify the folder.
- c. A dialog box will pop up, asking you where you want to move email for this rule. I opted to create a new folder named “Academic Impressions.” Step 2 now changes to reflect my decision.



- 3. Click the “Next” button to advance.



- 4. **Select Exceptions:** This brings you to a dialog box to create exceptions to the rule. I do not want to add exceptions to this, so I will not click into any of the checkboxes. If you select options from this list, remember that items with blue links require additional information from you, such as identification of words, people, or actions.
- 5. Click the “Next” button to get to the final steps for setting up a rule.
  - a. Name your rule
  - b. Run and/or toggle this rule on and off
  - c. Review the steps of the rule
  - d. Go back and make adjustments or click “Finish.”

