CHAPTER 6

INFOCUS

WORKING WITH RULES

You can organise and manage your Outlook mail using *rules*. A rule is an action that Outlook takes automatically when you receive or send a message that meets the conditions you specify in the rule.

In this session you will:

✓ gain an understanding of how rules can help you manage your messages
✓ learn how to create a new rule from a predefined template
✓ learn how to select the conditions for a rule
✓ learn how to set the actions for a rule
✓ learn how to specify exceptions for a rule
✓ learn how to name and review a rule
✓ learn how to test a new rule
✓ learn how to manage existing rules
✓ learn how to delete a rule.

ABOUT RULES

A ***rule*** is an action that is performed automatically by Outlook on an incoming or outgoing email message that meets all of the conditions that you specified when creating the rule. Rules do not affect email messages that have been read, only unread messages.

The Rules Wizard

One of the easiest ways in which you can create a rule is by using the ***Rules Wizard***. This wizard contains several predefined templates for creating the most commonly-used rules, plus the ability to create a rule from a blank rule template − in which case you specify your own conditions, actions and exceptions.

Rules tend to be grouped into one of two major groups − organisation and notification. As a result of this the ***Rules Wizard*** divides its templates accordingly.

Stay Organised These rules help you to file messages to the appropriate folder and to follow up on messages. For example, you might create a rule for messages from the sender, 'Brad Jones', with the word 'Europe' in the Subject, to be flagged for follow-up, categorised as 'European Sales', and moved to the European Sales folder.

Stay Up to Date These rules notify you when you receive a specific type of message. For example, you can create a rule that will play a specified sound when you receive messages from a particular person.
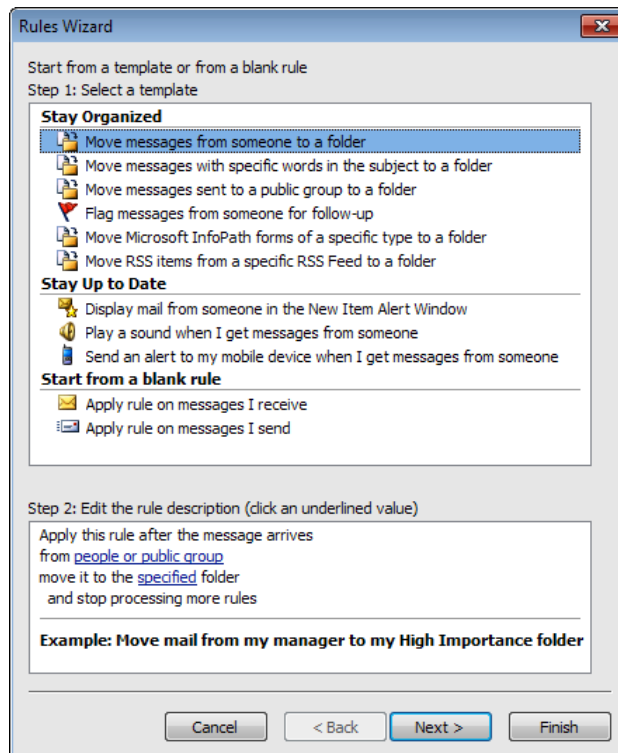
CREATING A NEW RULE FROM A TEMPLATE

The easiest way to create a new rule is to base it on one of the pre-existing templates found in the *Rules Wizard*. There are two main categories for rules: *Stay Organised* and *Stay Up to Date*. The

Stay Organised template rules help you to file or follow-up certain types of message. The *Stay Up to Date* template rules notify you when you receive certain types of messages.

Try This Yourself:

Open File

*Before starting this exercise you MUST open the file Watsonia_09.pst...*

1 Click on the *File* tab, then click on **[Manage Rules & Alerts]** to open the *Rules and Alerts* dialog box, then ensure the *E-mail Rules* tab is open

2 Click on **[New Rule]** to open the *Rules Wizard*

3 Click on *Play a sound when I get messages from someone* under *Stay Up to Date*

Notice the description of the rule, plus an example of how the rule can be used, appears in the bottom box under step 2. You can change the settings for the underlined values in this box by clicking on them. But we won't in this exercise...

4 Click on **[Next]** to proceed to the next step of the wizard
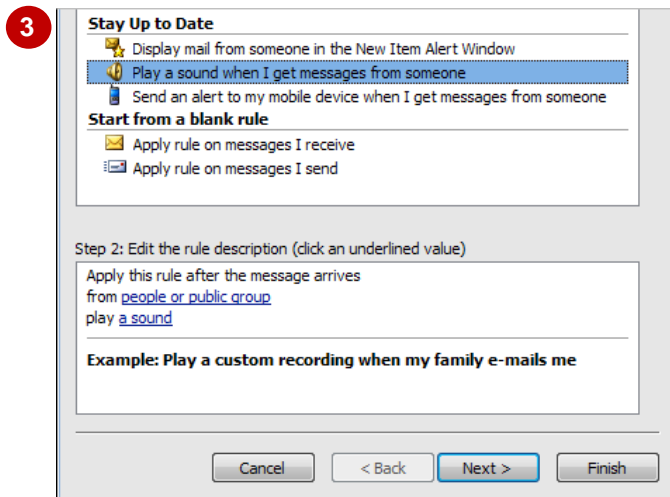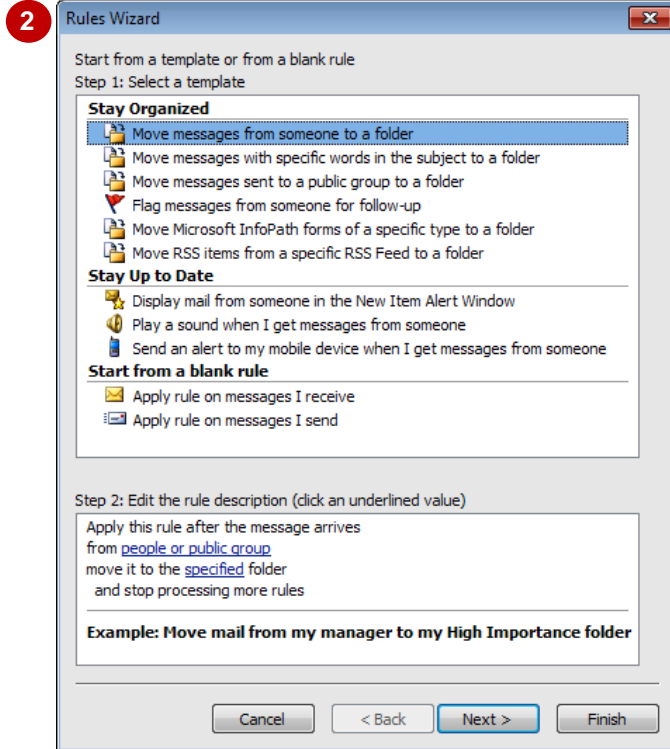
For Your Reference…

To *create* a new *rule* based on a *template*:

1. Click on the *File* tab, then click on **[Manage Rules & Alerts]** on the *Info* tab
2. Click on **[New Rule]**
3. Select the desired template
4. Click on **[Next]**

Handy to Know…

- You can create a rule directly from a specific message. For example, you can create a rule to move messages from the selected sender to a specific folder by right-clicking on the message, selecting **Rules** > **Create Rule** and then completing the *Create Rule* dialog box.

SELECTING THE RULE CONDITIONS

When using the ***Rules Wizard*** to create a new rule based on a template, you can define the conditions that must be met before the rul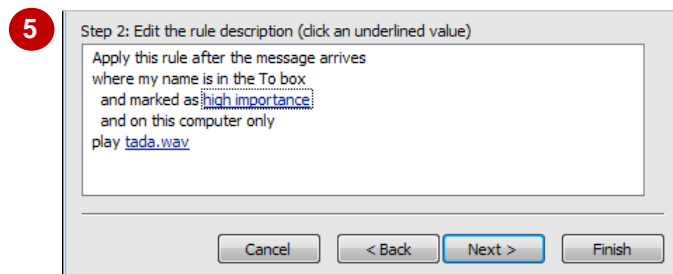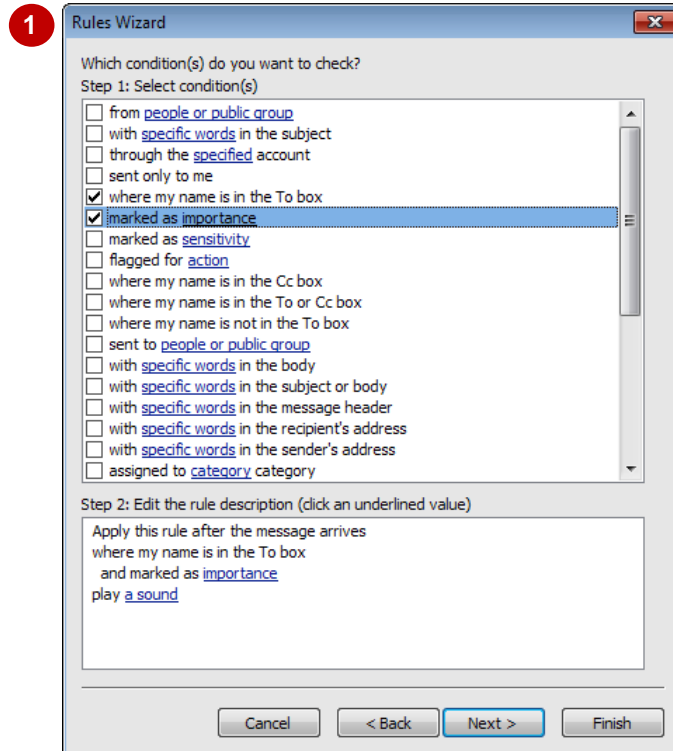e will be activated. Outlook provides a list of predefined conditions from which you can choose. Once you select the main conditions, you can then refine them by editing the rule description.

Try This Yourself:

Same File

Continue using the previous file with this exercise. The Which condition(s) do you want to check page of the Rules Wizard must be displayed...

1 Remove the tick from the ***from people or distribution list*** checkbox, then click in the checkboxes for ***where my name is in the To box*** and ***marked as importance*** until they both appear with a tick

Let's refine the conditions...

2 Click on ***importance*** in the ***Step 2*** box (in the bottom half of the dialog box) to open the ***Importance*** dialog box

3 Click on the drop arrow ▾ for ***Specify the importance to look for*** and select **High**, then click on **[OK]**

4 Click on ***a sound*** in the ***Step 2*** box to open the ***Select a Sound to Play*** dialog box

5 Navigate to the ***Course Files for Outlook 2010*** folder, click on ***tada.wav*** and then click on **[Open]**

6 Click on **[Next]** to proceed to the next step of the wizard

1

Rules Wizard

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

- [ ] from people or public group
- [ ] 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 public group
- [ ] with specific words in the body
- [ ] with specific words in the subject or body
- [ ] with specific words in the message header
- [ ] with specific words in the recipient's address
- [ ] with specific words in the sender's address
- [ ] assigned to category category

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

Apply this rule after the message arrives
where my name is in the To box
  and marked as importance
play a sound

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

5

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

Apply this rule after the message arrives
where my name is in the To box
  and marked as high importance
  and on this computer only
play tada.wav

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

For Your Reference…

To ***set conditions*** for a new ***rule***:

1. Open the ***Which condition(s) do you want to check*** page of the ***Rules Wizard***
2. Select the desired conditions in ***Step 1***
3. Edit the rule description in ***Step 2***
4. Click on **[Next]**

Handy to Know…

- You can apply multiple descriptions (criteria) to any rule you create. But Outlook will not activate the rule unless a message meets ALL of the rule's criteria.

SELECTING THE RULE ACTIONS

Once you have selected the conditions for a new rule, you are then ready to select the *actions* that you want the rule to take when the specified conditions are met. For example, if you've created a rule with a condition that looks for messages from a particular sender, you may set the action that these messages must be filed to a specific folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise. The What do you want to do with the message page of the Rules Wizard must be displayed...

1 Ensure that **play a sound** under *Select action(s)* appears ticked, then click in the checkbox for *assign it to the category category* until it appears with a tick

Let's edit the rule description...

2 Click on *category* in the *Step 2* box to open the *Colour Categories* dialog box

3 Click in the checkbox for *Red Category* until it appears with a tick, then click on **[OK]** to return to the *Rules Wizard*

4 Click on **[Next]** to proceed to the next step of the wizard
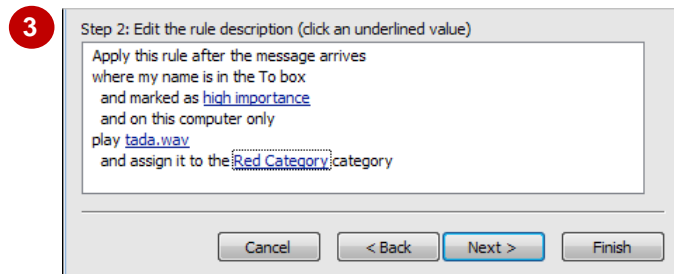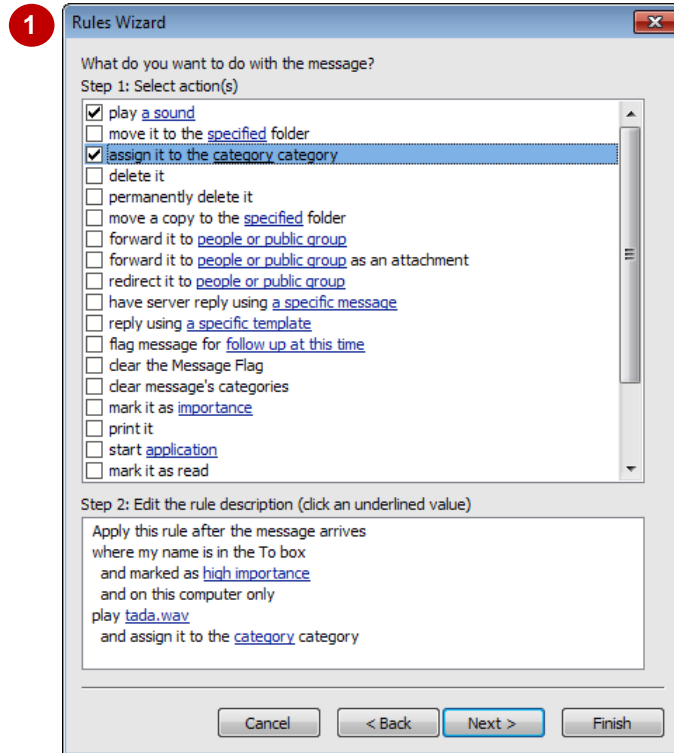
For Your Reference…

To *select* the *rule actions*:

1. Open the *What do you want to do with the message* page of the *Rules Wizard*
2. Select the desired actions in *Step 1*
3. Edit the rule description in *Step 2*
4. Click on **[Next]**

Handy to Know…

- If you work in an organisation that uses *Microsoft Exchange*, by default, messages that you forward to external email addresses outside your organisation using a rule will not be sent. This setting aims to help prevent the disclosure of corporate data and is controlled by your Exchange administrator.

SELECTING THE RULE EXCEPTIONS

Once you have specified the conditions and actions for a new rule, you can set *exceptions* to the rule if desired. For example, your rule may specify that when you receive a message from members of a particular distribution group, the message will be forwarded to your boss. If messages from a specific person in the list don't need to be forwarded, select them as an exception.

Try This Yourself:

Same File

Continue using the previous file with this exercise. The Are there any exceptions page of the Rules Wizard must be displayed...

1. Click in the checkbox for ***except if it is flagged for action*** until it appears with a tick

   Let's edit the rule description...

2. Click on ***action*** in the **Step 2** box to open the ***Flagged Message*** dialog box

3. Click on the drop arrow for **Enter the Message Flag to check for** and select **For Your Information**, then click on **[OK]** to return to the ***Rules Wizard***

4. Click on **[Next]** to proceed to the next step of the wizard
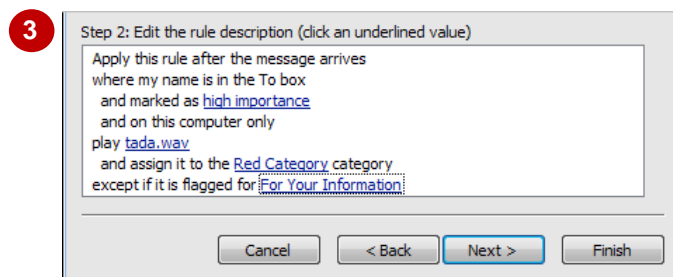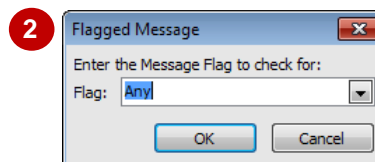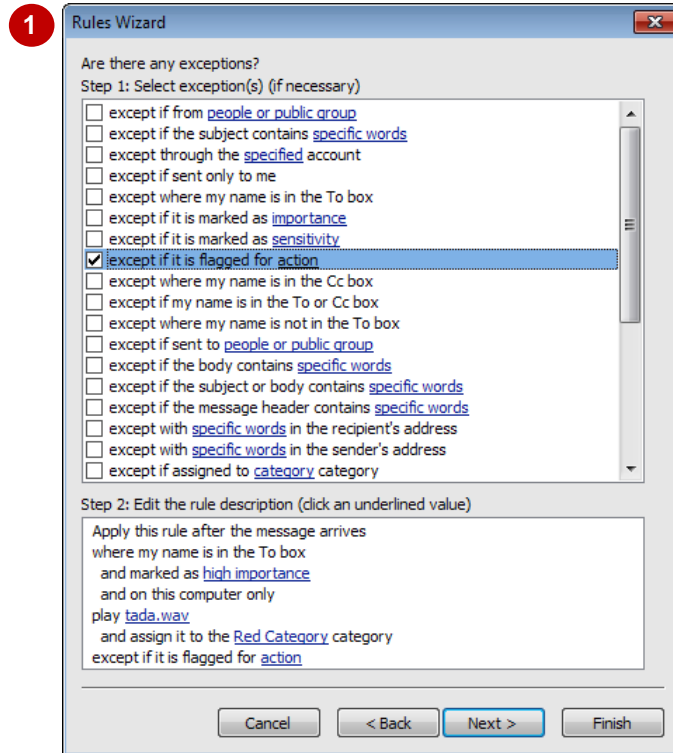
For Your Reference…

To *select* the *rule exceptions*:

1. Open the ***Are there any exceptions*** page of the ***Rules Wizard***
2. Select the desired exceptions in ***Step 1***
3. Edit the rule description in ***Step 2***
4. Click on **[Next]**

Handy to Know…

- You can make any changes to the rule as you are creating it by simply clicking on **[Back]** to return to the desired page of the ***Rules Wizard***.

NAMING AND REVIEWING THE RULE

After specifying the various elements comprising a new rule, the final step involves giving the new rule an appropriate name, deciding whether or not to turn it on and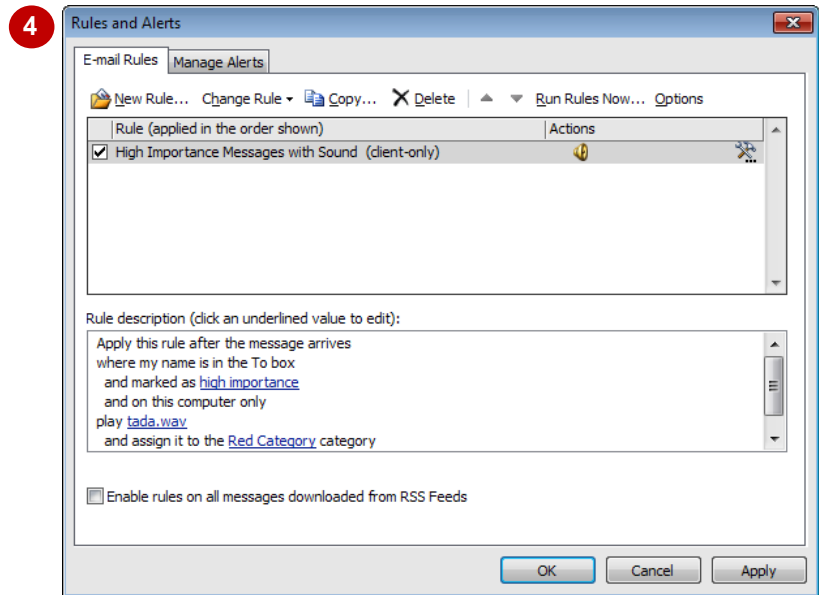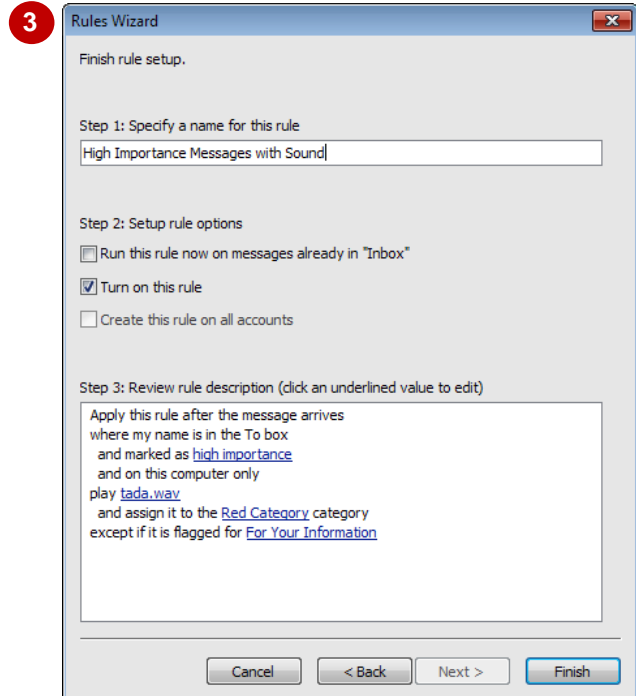 checking that its details will produce the desired effects. An example of when you might create a rule that you want to be activated under special circumstances could be when you are away from the office on holidays.

Try This Yourself:

Same File

Continue using the previous file with this exercise. The Finish rule setup page of the Rules Wizard must be displayed...

1 Type **High Importance Messages with Sound** in the *Step 1* box

2 Ensure that *Turn on this rule* in the *Step 2* box appears with a tick

   If you remove the tick from this checkbox, you will turn off the rule and it will not be applied to any messages...

3 Read through the rule description in the *Step 3* box and ensure that it looks identical to the example shown

4 Click on **[Finish]** (and on **[OK]** if a message referring to a client-only rule appears) to return to the **Rules and Alerts** dialog box

5 Click on **[OK]** and press `Esc` to return to the mail folders

3

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

High Importance Messages with Sound

Step 2: Setup rule options

☐ Run this rule now on messages already in "Inbox"

☑ Turn on this rule

☐ Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
where my name is in the To box
   and marked as high importance
   and on this computer only
play tada.wav
   and assign it to the Red Category category
except if it is flagged for For Your Information

Cancel   < Back   Next >   Finish

4

Rules and Alerts

E-mail Rules   Manage Alerts

New Rule...   Change Rule ▾   Copy...   ✕ Delete   ▲ ▼   Run Rules Now...   Options

Rule (applied in the order shown)	Actions
☑ High Importance Messages with Sound (client-only)	🔔

Rule description (click an underlined value to edit):

Apply this rule after the message arrives
where my name is in the To box
   and marked as high importance
   and on this computer only
play tada.wav
   and assign it to the Red Category category

☐ Enable rules on all messages downloaded from RSS Feeds

OK   Cancel   Apply

For Your Reference…

To *finalise* a *rule*:

1. Open the *Finish rule setup* page of the *Rules Wizard*
2. Specify a name in *Step 1*
3. Select to turn the rule on or off in *Step 2*
4. Review the rule's details in *Step 3*
5. Click on **[Finish]** and then on **[OK]**

Handy to Know…

- During the final step of creating a rule, you can specify to run this rule now on the default Mail folders by clicking in the *Run this rule now on messages already in "folder"* checkbox in the *Step 2* box on the *Finish rule setup* page of the *Rules Wizard*.

TESTING THE RULE

Once you have created a new rule, don't just trust that you have got everything right. After all, we're all humans – and humans make mistakes. Ensure that you take the time to send or receive, as required by the rule, a message that meets the conditions of your rule so you can check that the rule performs the desired actions on the message.

Try This Yourself:

Same File

Continue using the previous file with this exercise. You must have created the High Importance Messages with Sound rule...

1 Click on the *File* tab, then click on **[Options]** to open the *Options* dialog box

We'll need to turn off the standard Outlook sound in order to test the rule...

2 Click on **[Mail]** to display the Mail options

3 Remove the tick from the *Play a sound* checkbox under *Message arrival*, then click on **[OK]**

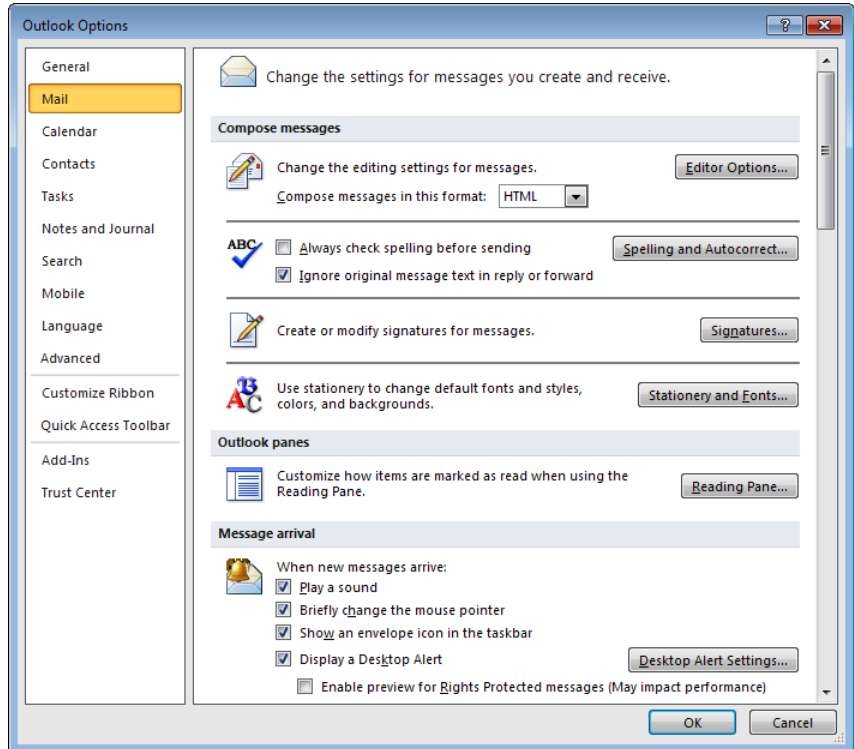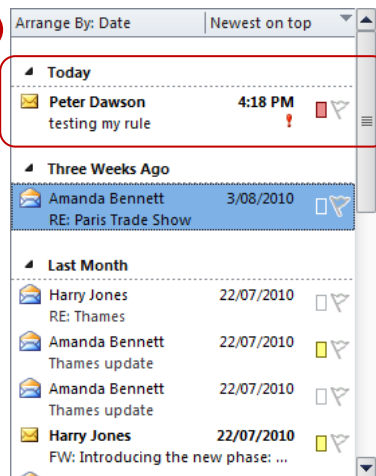4 Create a new message and address it to yourself

5 Click on *High Importance* 🔴 in the *Tags* group and then click on *Send* 📧

When the message arrives in your Inbox, you should hear a "ta da" sound and it should appear with a red category icon

For Your Reference…

To *test* a *rule*:

1. Send or receive a message that conforms to all actions included in the rule
2. Ensure that the desired actions were performed

Handy to Know…

- You can run a rule periodically. To do this click on the *File* tab, click on **[Manage Rules & Alerts]**, clear the checkbox for the rule to turn it off, and then click on **[Run Rules Now]**. Tick the rule under *Select rules to run*, select the *Run in Folder* and *Apply rules to*, and then click on **[Run Now]**.
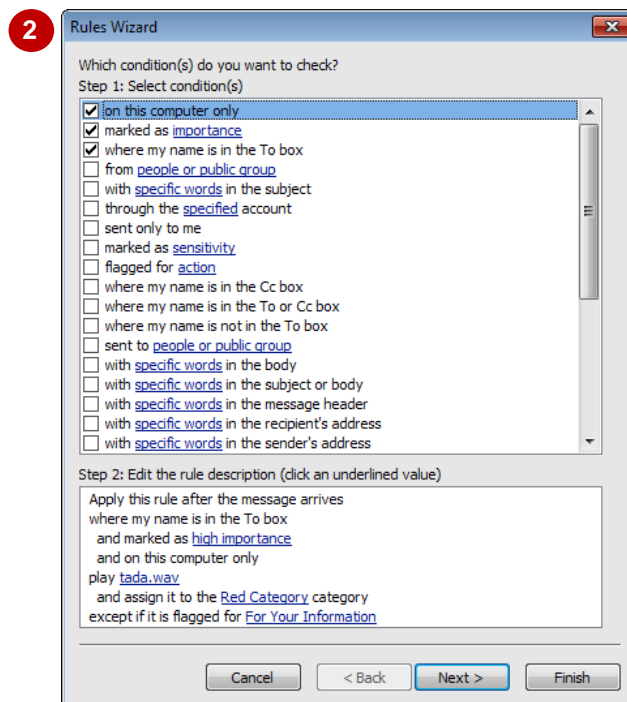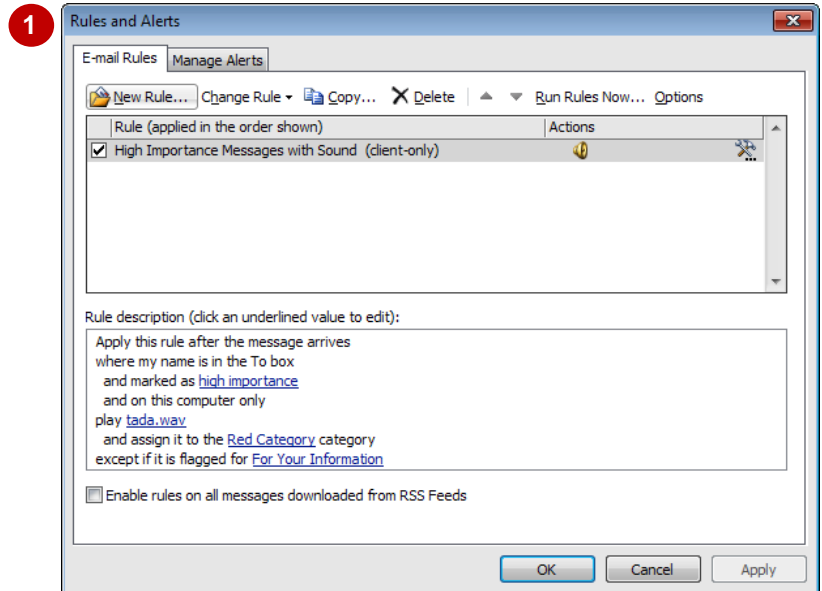
MANAGING EXISTING RULES

Once you have created a rule, you can easily manage and control the rule using the *Rules and Alerts* dialog box. You can use this dialog box to turn on and off specific rules, change their settings, copy and delete them, choose to run all of the rules that are currently turned on and, using **[Options]**, you can import and export rules between different versions of Outlook.

Try This Yourself:

Continue using the previous file with this exercise...

1   Click on the *File* tab, then click on **[Manage Rules & Alerts]** to open the *Rules and Alerts* dialog box, then ensure the *E-mail Rules* tab is open

2   Ensure that the *High Importance Message with Sound* rule is selected, then click on **[Change Rule]** and select **Edit Rules Settings** to open the *Rules Wizard*

3   Click on *tada.wav* in the *Step 2* box to open the *Select a Sound to Play* dialog box

4   Ensure that the course files folder is open, then click on *Laugh.wav* and click on **[Open]**

5   Click on **[Finish]** to complete the changes, and then click on **[OK]**

6   Press `Esc` to close *Backstage*, then create a new message and address it to yourself

7   Click on *High Importance* ❗ in the *Tags* group and then click on *Send* ✉

You'll hear a laughing sound when you receive the mail

1   *Rules and Alerts* dialog box

2   *Rules Wizard*

For Your Reference…

To *change* an *existing rule*:
1. Click on the *File* tab, then click on **[Manage Rules & Alerts]**
2. Select the desired rule
3. Click on **[Change Rule]** and select **Edit Rules Settings**
4. Make the desired changes

Handy to Know…

*   You can change the order in which the activated rules (their checkboxes are ticked) are actioned using the *Rules and Alerts* dialog box. To do this, click on the rule to be moved and then click on either *Move Up* ▲ or *Move Down* ▼.

DELETING A RULE

If a rule is temporarily not required, you can easily turn it off by clearing its checkbox in the *Rules and Alerts* dialog box. But, if you have created a rule that you feel won't ever be required again, you can delete it permanently, again using the *Rules and Alerts* dialog box.


Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Click on the *File* tab, then click on **[Manage Rules & Alerts]** to open the *Rules and Alerts* dialog box, then ensure the *E-mail Rules* tab is open

2 Click on the *High Importance Message with Sound* rule to select it

3 Click on **[Delete]**

You'll be asked to confirm your intentions...

4 Click on **[Yes]**, then click on **[OK]** to return to the *Backstage*

Let's turn on the standard Outlook sound again...

5 From the *Backstage*, click on **[Options]** to open the *Options* dialog box

6 Click on **[Mail]** to display the Mail options

7 Click in the *Play a sound* checkbox under *Message arrival* until it appears with a tick, then click on **[OK]**
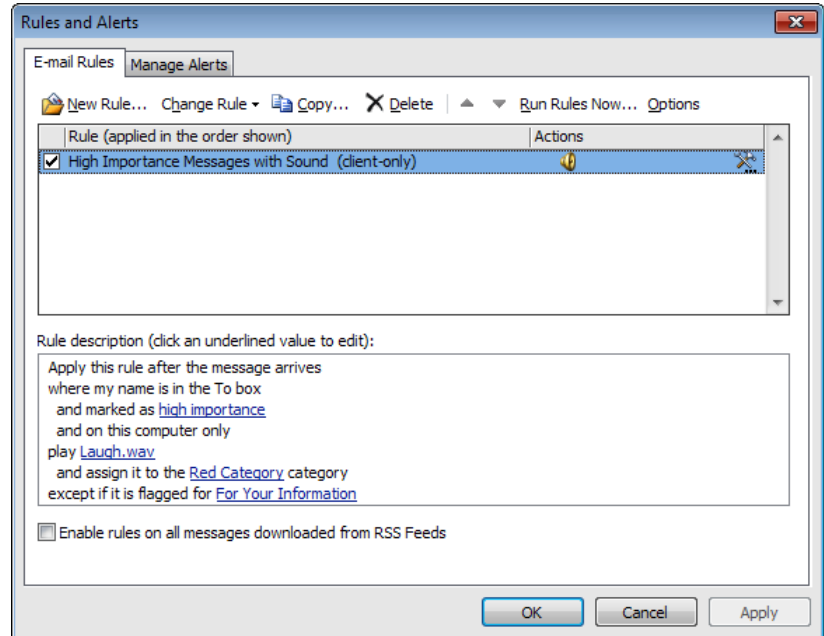
②

③
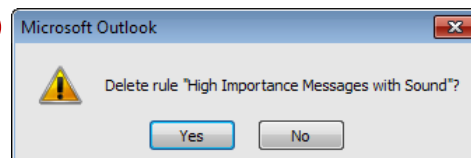
For Your Reference…

To *delete* an *existing rule*:

1. Click on the *File* tab, then click on **[Manage Rules & Alerts]**
2. Select the desired rule
3. Click on **[Delete]**
4. Click on **[Yes]** and then on **[OK]**

Handy to Know…

- If you specify a rule for a particular Mail folder, such as the Inbox, you can open the *Rules and Alerts* dialog box and **[Copy]** the rule to another folder if desired.