

## QUICK REFERENCE GUIDE Using the Rules Wizard in Outlook 2007

### Overview

**Rules** are tools you can use to control incoming, outgoing, and existing messages. You can specify the type of rule, the conditions necessary to apply a rule, and the action to be performed if a message satisfies a rule. This handout will cover creating rules to move e-mail messages; to categorize e-mail messages; to forward e-mail messages; and to delete e-mail messages.

**The Rules and Alerts Wizard.** Outlook uses a Rules and Alerts Wizard to create or change a rule or to arrange the order in which rules are run. There are four steps to the Wizard: 1) selecting a template and editing the rule description; 2) selecting the conditions that must be met for the rule to be run; 3) selecting the action to be taken when the condition is met; and 4) determining if there are any exceptions to the rule. Use the following steps to create a rule.



Figure 1: The Rules and Alerts Wizard


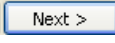
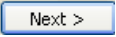
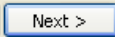
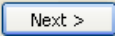

- 1) From the **Tools** Menu, click on **Rules and Alerts**.
- 2) Click the  button to create a new rule. The **Select a template** step appears and is divided into these categories: **Stay Organized**, **Stay Up to Date**, and **Start from a blank rule**. (See Figure 2.)
  - a) To move messages to a new folder, choose **Step 1: Move messages from someone to a folder**.
  - b) Continue with **Step 2: Edit the rule description** by specifying the people or the distribution list and the folder to which the messages should be moved.
  - c) Click the  button to continue.
- 3) The **conditions** step appears and asks you to check the conditions that must be met for the rule to run. (See Figure 3.) As you specify the conditions, you will see the rule as it will run in the **Step 2: Edit the rule description** portion of the dialog box. Click the  button to continue.



Figure 2: Select a Template and Edit the Rule

4) The **actions** step appears and asks what you want to do with the message when the condition has been met. (See Figure 4.) As you specify the conditions, you will see the rule as it will run in the **Step 2: Edit the rule description** portion of the dialog box. Click the  button to continue.

5) The **exceptions** step appears and asks whether there are exceptions to when this rule should run (for example, when there is a certain word in the document or when the message is addressed to a certain person. (See Figure 5.) As you specify the conditions, you will see the rule as it will run in the **Step 2: Edit the rule description** portion of the dialog box. Click the  button to continue.

6) The last step in the wizard asks you to name the rule and to specify whether the rule should be run on messages already in the folder. Click the  button to finish the wizard setup.

**Hints for Moving E-mail.** When moving e-mail, set the wizard to move messages from people or a distribution list to a specific folder.

**Hints for Categorizing E-mail.** Set the wizard to assign messages from a particular person to a particular category.

**Hints for Forwarding E-mail.** Set the wizard to assign messages from a particular person or containing specific words to another user or e-mail account.

**Hints for Deleting E-mail.** Set the wizard to delete all junk messages from a particular e-mail address to the Deleted Items Folder.

If you have any questions about Microsoft Outlook 2007 or the techniques demonstrated here, please call the ITS Help Desk at extension 8900.



Figure 3: Conditions



Figure 4: Actions



Figure 5: Exceptions