

Outlook 2007 and 2003

Outlook, UWS' standard email program, has many features designed to help you manage and organise your email more effectively, including Rules. Creating a rule defines how Outlook responds when messages conforming to the rule are received. For example, you could create a rule to move all messages related to a particular topic, or from a particular person, to an email sub-folder. You could flag messages from a particular sender as important, play a sound when they are received, forward to a different address, or automatically delete messages.

Rules can be based on an existing message, created from scratch, or created from a built in Outlook template. This fact sheet explains the process of creating a rule from an existing message. Screen shots are from Outlook 2007 (Windows Vista).

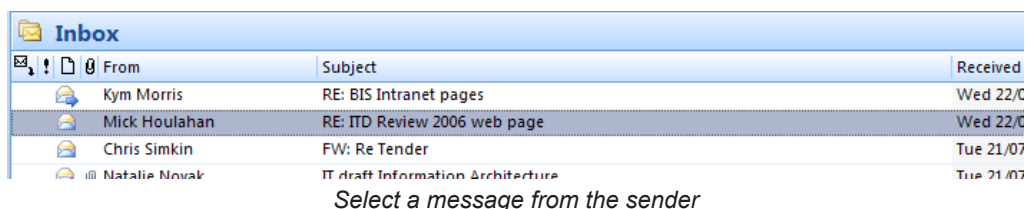
Rules you create only affect your UWS email account, and have no impact on your colleagues.

Creating a new rule

For the purposes of this fact sheet, we will create a rule based on an existing message, which will move all messages from a particular sender to a new folder. You should be able to apply the same principles to create different rules from existing messages.

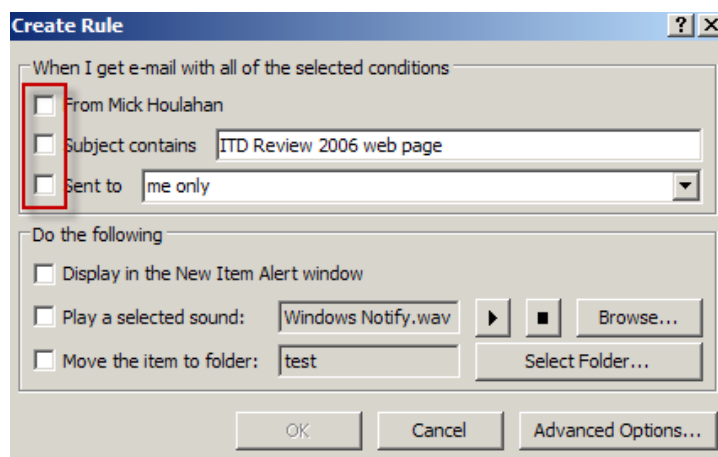
Open Outlook

Select a message from the chosen sender.



Press Outlook's **Create Rule** button , found on Outlook's main toolbar.

The Create Rule dialogue box will open, with information relating to the selected message pre-entered into the fields.



The **Create Rule** dialogue, showing fields automatically completed

The basic create rule box offers you three options for received mail.

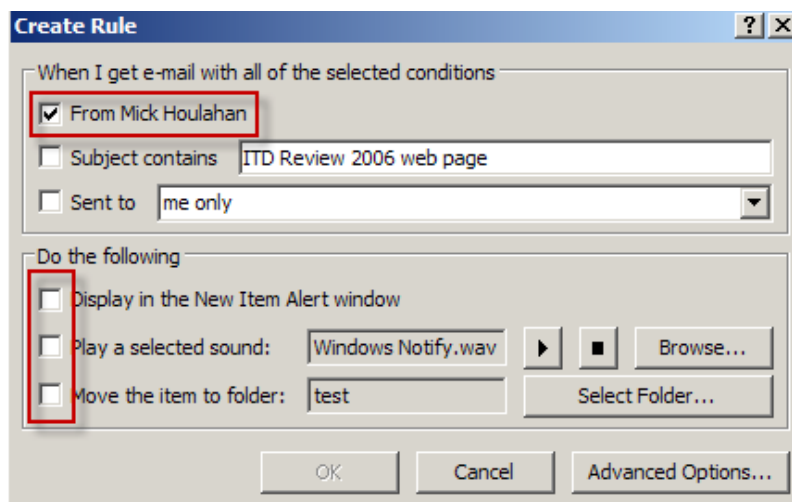
- **From...** – this option allows you to apply the rule to all emails from a particular sender address.
- **Subject contains...** – this option allows you to apply the rule to all messages with a subject containing text you have specified. For example, you could filter all messages containing “E-Update” as part of the subject to their own folder.

Or

- **Sent to...** – this option allows you apply the rule to all messages you receive that are sent to at least one of the recipients of the message. For example, if you are often cc'd on messages sent to your boss, you could filter messages sent to your boss' address to their own folder.

To create a very specific rule, you can choose all three conditions.

In this example, all messages from the selected message's sender (Mick Houlahan), will be moved to a new folder. Tick the **From** checkbox.



*The **From** checkbox is ticked*

Now we need to tell Outlook what to do when email from Mick Houlahan is received.

Once again, there are three options:

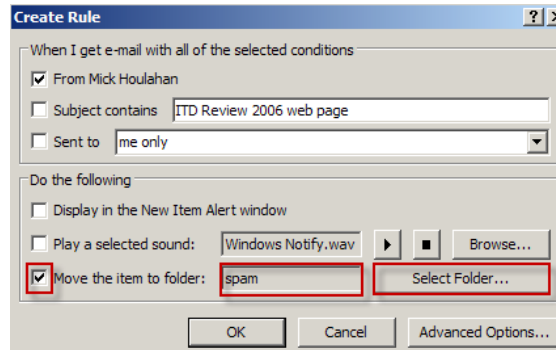
- **Display in the New Item Alert window** – opens a small window listing messages conforming to the rule as they are received. A New Item Alerts button appears on your taskbar.
- **Play a sound** – allows you to play a sound when messages conforming to the rule are received.

Or

- **Move email to folder** – moves conforming messages to a different mail folder.

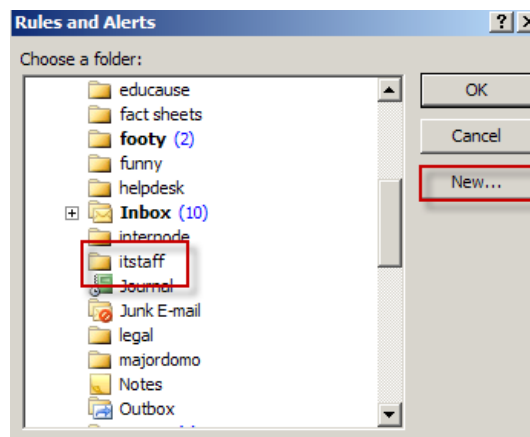
You can choose one, two, or three action options.

In this example, all email from the message sender will be moved to a folder. Tick the **checkbox**, and, if the pre-filled folder is correct, press **OK**. In this example the folder is incorrect, so we need to press the **Select Folder...** button.



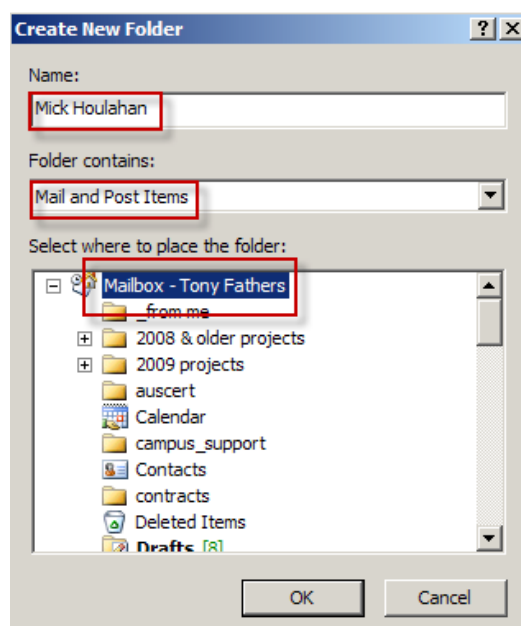
Tick the Move the item... checkbox and press Select Folder...

The Rules and Alerts window will open with your existing email folders listed. You can move the email to an existing or new folder. To move email from your selected sender to an existing folder, **select the folder** name and press **OK**. To create a new folder press the **New...** button.



Select a folder, or press New...

The Create New Folder window will open.

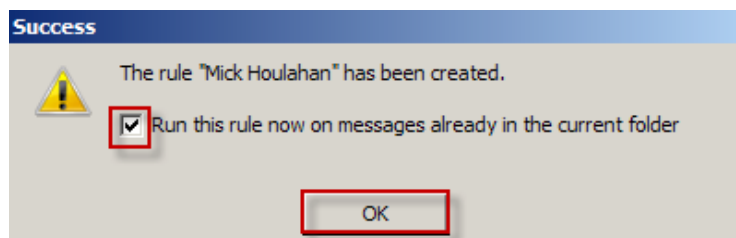


The Create New Folder window

Enter a **relevant name** for the folder in the Name: field – for this example we'll use **the sender's name** as the folder name. Ensure the Folder contains: field reads **Mail and Post Items**. If not, select Mail and Post Items from the drop down menu.

Select where to place the folder. It can be a sub folder to an existing folder, or a top level folder within your mailbox. To create a new sub-folder, select the existing folder and press **OK**.

To create a top level folder, select **your user name** (at the top of the folder list) and press **OK**. The Create a New Folder window will close. Press **OK** to close the Rules and Alerts window. Press **OK** on the Create Rule Dialogue box to save your rule. A success window will appear.



Tick the checkbox to run the rule in the current folder and press OK

Tick the **checkbox**. Press **OK** to apply the new rule. All messages in the current folder conforming to the rule will be moved to your chosen folder. All future messages conforming to the rule will be moved automatically.

All done!

More Information

More Information on rules is available from [Microsoft](#).



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