

0365 EMAIL: MANAGING MAIL WITH RULES – MAC OS X

Rules are tools that people can use to automatically sort, flag, categorize or filter email messages. This guide will show you how you can create rule templates that can be applied to messages. If turned on, rules will be applied to all incoming messages – actions will be performed if a message meets specific criteria. You can customize rules to do almost anything you want – this guide will only provide a basic layout on how to create your own rules – it won't provide an exhaustive list of examples.

Creating a Rule

1. Launch Outlook 2016 from your Dock or Applications folder – make sure your O365 email account (@utoronto.ca) has been pre-configured.
2. There are two ways to access the main rules creation window: 1) from Outlook 2016, **Home** tab, click on **Rules**, then **Create Rule**. 2) From the Outlook toolbar menu (top of your screen), click on **Tools**, then **Rules**. From the Rules Manager window, click on the + icon to create a new rule.

No matter which option you use, you should see the rule creation window (shown below).

The screenshot shows the 'Add New Rule' dialog box in Outlook 2016. The 'Rule name' field contains 'Test Rule'. The 'When a new message arrives that meets all these conditions:' section has three conditions: 'From' is 'Is', 'Sent To' is 'Is', and 'Subject' is 'Contains'. The 'Do the following:' section has one action: 'Move to Folder' set to 'None'. The 'Except if:' section is empty. The 'Do not apply other rules to messages that meet the same conditions' checkbox is checked. The 'Enabled' checkbox is also checked. 'Cancel' and 'OK' buttons are at the bottom right.

3. Within this window, you will create the various inputs for your rule. The default values that are shown in the screenshot above will change depending on the email you had selected in your Inbox prior to spawning the Rules window. If you wish to create a rule based on a specific email, make sure it is selected, and return to Step 2 to bring up the Rules window again.

4. The dialog window shown in Step 2 will be divided into three sections: 1) **Conditions**, 2) **Actions** and 3) **Exceptions**.

Conditions is a set of criteria that an email will have to meet. They can range from a variety of different criteria:

- From specific people or groups
- Sent to specific people (including yourself)
- Marked with a level of importance (e.g. urgent)
- Marked with a level of sensitivity (e.g. confidential)
- Based on specific words (keywords) in the body, subject or message headers
- Received within a date range
- Messages that have attachments
- And more!

When customizing your conditions, remember that this will filter all incoming emails against these criteria. You can create multiple conditions (clicking the + button) – email messages will have to satisfy all conditions for the rule to apply.

Actions is a set of actions you wish to perform if a message meets the **Conditions** you specified above. They can range from a variety of options:

- Move, copy or delete the email item
- Pin the message
- Mark the message (as important, as a category, as read, as junk)
- Forward, redirect or send the message
- Categorize the message

When customizing your actions, remember that actions will be performed in the order that they are listed. You can create multiple conditions (clicking the + button), if you wish.

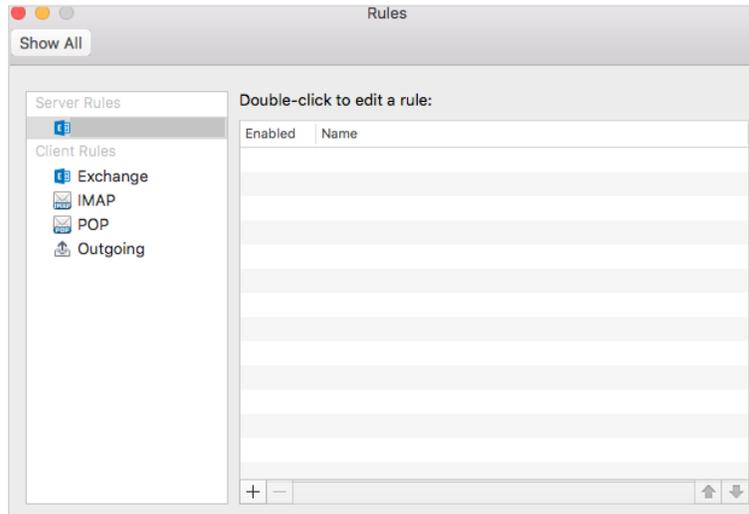
At the bottom of the window, you can specify **Exceptions**. The list of available exceptions should be similar to the list of Conditions. To specify an Exception, click on the + button and select the appropriate condition.

When setup, the rule will behave in a specific manner: all incoming new mail messages that meet the *Conditions* you specified, will have the *Action* applied to them, unless they meet the *Exceptions* that you have specified.

Once a new rule is initially setup, you have the option of running it on existing email within your Inbox. In cases where you specify moving mail items to a folder, you may notice this taking effect immediately.

Managing Existing Rules

1. To bring up the Rules manager window, click on the Outlook menu bar, then **Tools**, then **Rules**.



2. The window above will show a listing of all rules created on your O365 email account. You can double-click to edit an existing rule, click on the + icon to make a new rule, or select and click the – button to delete a rule.
3. The up and down arrows will move selected rules up and down the list. If you have multiple rules listed here, Outlook will process the rules in order they are listed here. For example, if an incoming message will be flagged by multiple rules, it will have the actions applied to it from the top-most rule listed in the **Rules** manager window.

Keep this in mind if you find a rule is not behaving as expected.