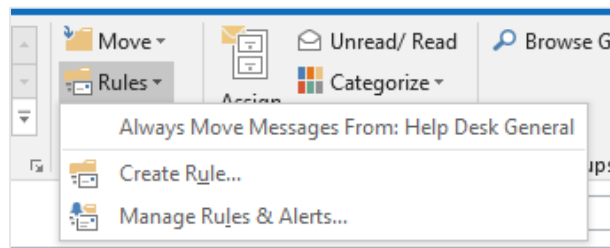


# 0365 EMAIL: MANAGING MAIL WITH RULES – WINDOWS

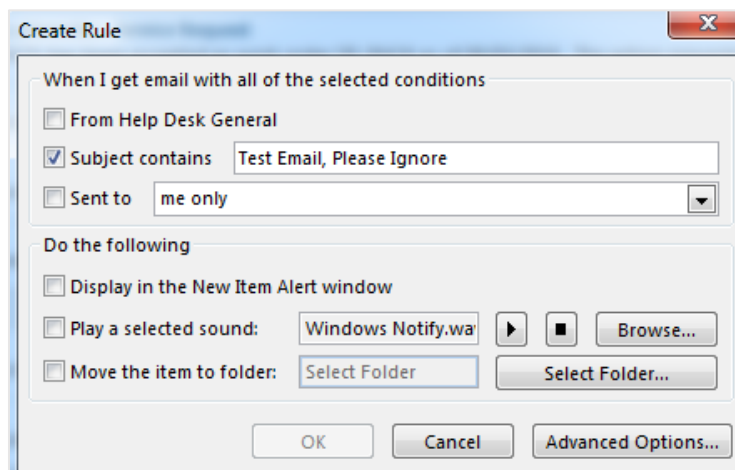
Rules are tools that people can use to automatically sort, flag, categorize or filter email messages. This guide will show you how you can create rule templates that can be applied to messages. If turned on, rules will be applied to all incoming messages – actions will be performed if a message meets 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 Simple Rule

1. Launch Outlook 2016 – make sure your O365 email account (@utoronto.ca) has been pre-configured.
2. You should see a **Rules** button on the **Home** tab within Outlook. If you would like to create a rule based on a specific email, click on the email to highlight it and click on the **Rules** button. You may see an option called **Always Move Messages From: <sender>**. You will also see options for **Create Rule** and **Manage Rules & Alerts**.



3. With an email highlighted from Step 2, click on **Create Rule**.



4. The dialog window shown in Step 3 will be divided into two sections: 1) **Criteria** and 2) **Actions**.

**Criteria** is a set of conditions that an email will have to meet. Simple rules have three types of criteria:

- **From <sender>** : flag messages sent from a specific individual
- **Subject contains <keywords>**: flag messages containing specific keywords in the subject line
- **Sent To <people>**: flag messages sent to a specific individual (including yourself)

*Please note that the available criteria suggested in Step 3 will change based on which email message you've selected in Step 2.*

**Actions** is a set of actions you wish Outlook to perform if a message meets the **Criteria** you specified – they are listed under the heading **Do the following**. Simple rules have three types of actions:

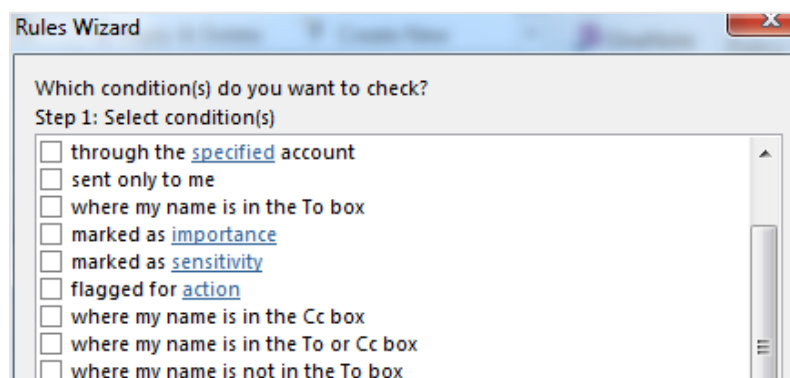
- **Display alert in New Item Alert** : Outlook will display a new mail notification as if you have received a new mail item.
- **Play sound**: Windows will play a customized sound when new messages arrive that meet the criteria. You can customize the sound that is played.
- **Move item to folder <folder>**: Move the mail item to the specified folder

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.

## Creating an Advanced Rule

Advanced rules offer more options for Criteria and Actions, allowing you to fully customize how you want to handle incoming mail items.

1. From the **Home** tab (with an appropriate email selected), click on **Rules**, then **Create Rule**. Next click on the **Advanced Options** button. A Rules Wizard window should pop up and display a robust list of rule criteria to select from.



Amongst the criteria, you'll be able to select messages based on the following filters:

- 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
- Assigned to a specific colour category
- Received within a date range
- Messages that have attachments
- And more!

Clicking a desired option will populate that option in the Step 2 textbox. In the example below, the user has selected to filter messages "Marked as importance".

The screenshot shows the 'Rules Wizard' dialog box. The title bar says 'Rules Wizard'. The main area is divided into two sections. The top section is titled 'Which condition(s) do you want to check?' and 'Step 1: Select condition(s)'. It contains a list of conditions with checkboxes. The 'marked as importance' option is checked and highlighted. The bottom section is titled 'Step 2: Edit the rule description (click an underlined value)'. It contains a text box with the text 'Apply this rule after the message arrives' and 'marked as: importance:'. The word 'importance' is underlined. At the bottom of the dialog are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

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

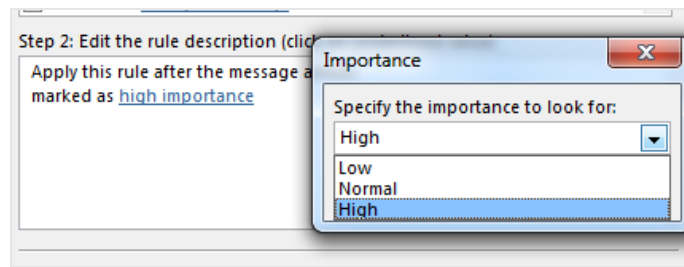
- ☐ through the [specified](#) account
- ☐ sent only to me
- ☐ where my name is in the To box
- ☒ **marked as importance**
- ☐ marked as [sensitivity](#)
- ☐ flagged for [action](#)
- ☐ where my name is in the Cc box
- ☐ where my name is in the To or Cc box
- ☐ where my name is not in the To box
- ☐ with [specific words](#) in the 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
- ☐ assigned to any category
- ☐ which is an automatic reply
- ☐ which has an attachment
- ☐ with a size [in a specific range](#)

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

Apply this rule after the message arrives  
marked as: importance:

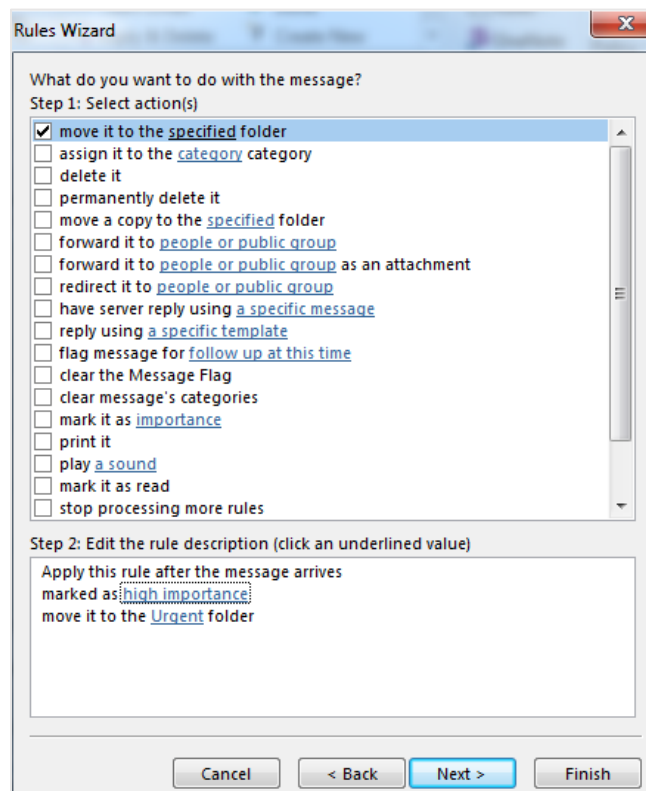
Cancel < Back Next > Finish

Next, click on the blue link shown in the Step 2 box. This will allow you to specify criteria. In this example, the user has selected messages with High Importance.



You can select multiple criteria at the same time – doing so will add the term “and” to the rule. For the rule conditions to be satisfied (and apply to incoming messages), BOTH criteria would have to be true.

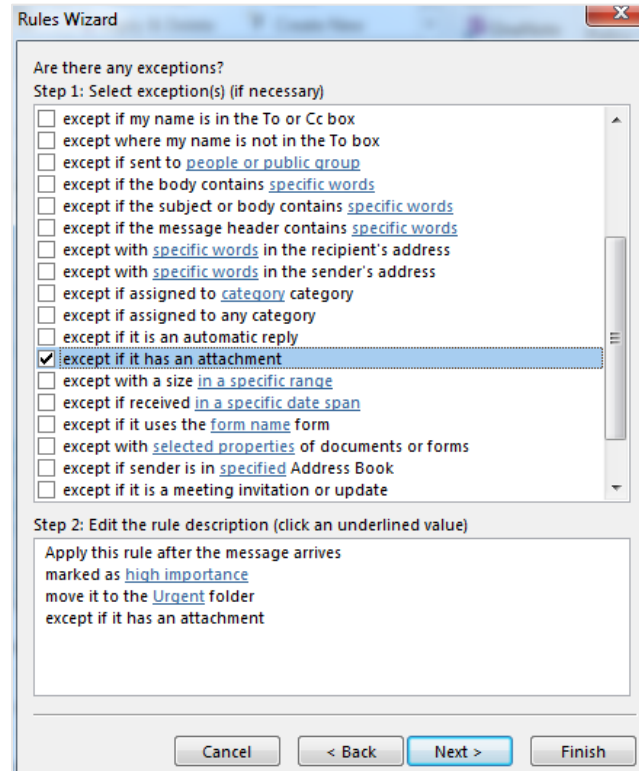
2. Once the criteria have been selected, click **Next** to continue.
3. As in Step 1, select the action you wish to take once the criteria have been met. In the example shown below, messages that are flagged as important will be moved to a new folder (Urgent).



You can select multiple actions at the same time – doing so will add the term “and” to the rule. When a message meets the criteria identified in Step 1, BOTH actions will be applied.

4. Once the appropriate actions have been selected, click **Next** to continue.
5. Finally, you’ll now have to select the *exceptions* that will be applied to the rule. Options selected will prevent certain messages from being flagged, even if they meet the criteria listed in Step 1. For

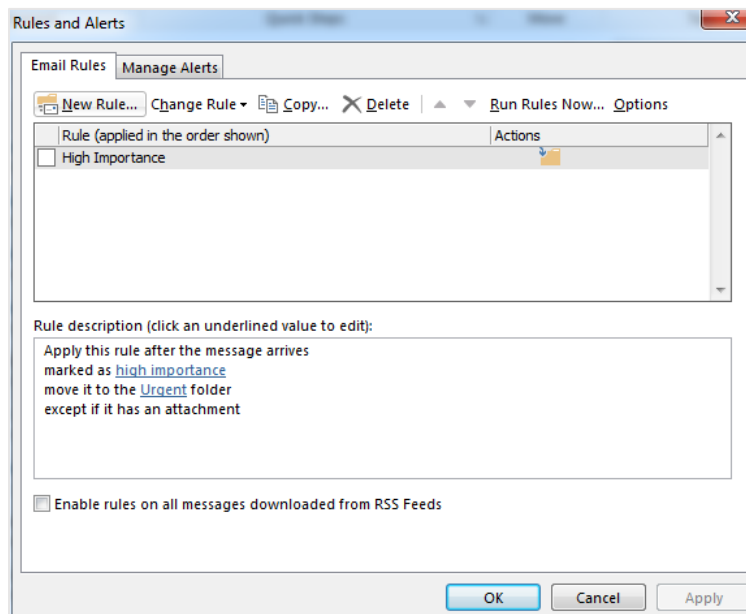
example, the user in this example has opted to select all messages marked as High Importance and to move them to the Urgent folder. They may wish to exempt emails that have attachments.



If you wish to have no exemptions (exceptions), click on Next or Finish to complete the rule. If you clicked on Next, you'll have an option to give your rule an appropriate name and can turn the rule 'on' (or immediately apply it to your Inbox).

## Managing Existing Rules

1. From the **Home** tab, click on **Rules**, then **Manage Rules & Alerts**.



2. The window will display all rules you have made for your O365 mailbox. Rules that do not have a checkmark to the left of them are inactive – they will not trigger when new messages arrive. From here, you can make copies of rules, edit, rename or delete existing rules, or run a rule immediately. You can also import/export a list of rules from a previous installation/setup.
3. The up and down arrows will move selected messages up and down the list of rules. 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 & Alerts** window.

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