Using Rules



Objective

This document provides instructions on how to use rules in Outlook 2013 (after your LAUSD mailbox has migrated to Office 365).

Part 1 - What are Rules?

Rules help you automate your Inbox. In other words, Rules perform repetitive actions to messages as they are delivered. For example, a Rule can automatically identify a weekly PTA newsletter and move it to a designated folder. This reduces the repetitive actions you need to perform and gives you more time for other tasks.

Rules have two primary components:

- Conditions: the criteria you want the messages to meet in order to trigger the Actions
- Actions: the activities you want the Rule to perform when the specified Conditions are met

Part 2 - Create a Rule

1. Select a message that meets your criteria.



2. Right-click the message, and select **Rules > Create Rule**.

sadatrain.onmicrosoft.com on Yammer Your Yammer activity for Wednesday, May 28 sadatrain onmicrosoft.com	r	5/28/2014			Follow Up 1 If there are problems with how this message is displayed, click here
sadatrain.onmicrosoft.com on Yamme You have a new follower on Yammer	₽ ₽	<u>C</u> opy <u>Q</u> uick Print			Action Items
sadatrain.onmicrosoft.com sadatrain.onmicrosoft.com on Yamme Molly Clark likes your Yammer message		<u>R</u> eply Reply <u>A</u> ll For <u>w</u> ard			sadatrain.onmicro
sadatrain.onmicrosoft.com Northwind Traders The "Northwind Traders" site has a new mailbox	2	Mar <u>k</u> as Read Mark as U <u>n</u> read			Daily Digest for Wedn
Now you can send mail to Amy Alberts; Alan Steiner; Diane Pr Contoso's 3rd Annual Hiking Trip	■ ►	Ca <u>t</u> egorize Follow <u>U</u> p Assign <u>P</u> olicy	*		 24 conversations have 47 24 new members (Kelly Ki
All, Kelly Krout; Molly Clark; Alan Steiner Action Required: Northwind Traders Contract	•	<u>F</u> ind Related <u>Q</u> uick Steps	F F		Greg Winston: Welcom
I'm also available to help out if you need anythin Renee Lo	* •	Rule <u>s</u> Move) }	-	Always Move Messages From: sadatrain.onmicrosoft.com on Yammer
Hi Karen, Congratulations on your new account	** ©	Ignore Junk	•	1	Create Rule Create a rule based on the sender or recipients of this message to always
Introduction to Karen Berg Hi Alex, I would like to introduce you to one of n		<u>D</u> elete		A	S move mail to a specified folder.

3. This opens the Create Rule window.

	Create Rule
	When I get e-mail with all of the selected conditions
Conditions	From sadatrain.onmicrosoft.com on Yammer
conditions	Subject contains Your Yammer activity for Wednesday, May 28
	Sent to me only
	Do the following
	Display in the New Item Alert window
Actions —	Play a selected sound: Windows Notify.war 🕨 🔳 Browse
	Move the item to folder: Select Folder Select Folder
	OK Cancel Advanced Options

- 4. Under "When I get e-mail with all of the selected conditions," select one or more Conditions.
- 5. Under "Do the following," select one or more Actions.
- 6. To select additional Conditions or Actions, click Advanced Options. (See steps 3-13 of Edit a Rule below.)
- 7. Click OK.
- 8. The Success notification appears. To apply your Rule retroactively to all messages in your Inbox, select the "Run this rule now on messages already in the current folder" checkbox.



9. Click OK.

Part 3 - Edit a Rule

1. Select the Home tab in the top left corner, click the Rules button, and select Manage Rules & Alerts.

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FILE HO	FILE HOME SEND / RECEIVE FOLDER VIEW								
New New Email Items •	ि Ignore ≧ Clean Up + Delete S Junk +	Reply Reply Forward I More -	! Action Required Image: Move to folder Image: Team Email ✓ Done Y Create New	Carlo Manager	Rules OneNote Assign Unread/ Policy* Read				
New	Delete	Respond	Quick Steps	Fai	Always Move Messages From: :				
▲ Favorites Pipeline	<	Search Current Mailbox (Ctrl+E) All Unread	♀ Current Mailbox ▼ By Date (Conversations) ▼ Newest ↓ ▲	Reply Reply All Reply All Soft	📻 Create R <u>u</u> le 🎦 Manage Ru <u>l</u> es & Alerts				

2. This opens the Rules and Alerts window. Select the Rule you'd like to edit, and click **Change Rule > Edit Rule Settings**.

Rules and Alerts		×
E-mail Rules Manage	Alerts	
Rule (applied Rule (applied Sadatrain.onr Newsletter Northwind Rule description Apply this rule : from sadatrain.	nge Rule V Piority	Actions
move it to the Yamma and stop processin	g more rules	OK Cancel Apply

3. This opens the Rules Wizard to the "Which condition(s) do you want to check?" screen.

Rules Wizard	Rules Wizard
Which condition(s) do you want to check?	What do you want to do with the message?
Step 1: Select condition(s)	Step 1: Select action(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 <u>importance</u> marked as <u>sensitivity</u> flagged for <u>action</u> where my name is in the Cc box where my name is in the To box where my name is in the Cc box where my name is 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 recipient's address with specific words in the sender's address assigned to <u>category</u> category	✓ istop processing more rules ✓ move it to the specified folder assign it to the category category delete it □ permanently delete it □ now a copy to the specified folder □ forward it to people or public group □ forward it to people or public group □ have server reply using a specific message □ reply using a specific template □ flag message for follow up at this time □ clear the Message Flag □ clear the a sound □ pint it □ play a sound □ start application
Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from sadatrain.onmicrosoft.com on Yammer move it to the Yammer folder and stop processing more rules Cancel < Back	Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from sadatrain.onmicrosoft.com on Yammer move it to the Yammer folder and stop processing more rules Cancel < Back
Rules Wizard: Conditions	Rules Wizard: Actions

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- 4. Under "Step 1: Select condition(s)," select or deselect any Conditions.
- 5. Under "Step 2: Edit the rule description (click an underlined value)," click an underlined value for any Condition, and edit the value.
- 6. Click **Next**. This opens the Rules Wizard to the "What do you want to do with the message?" screen.
- 7. Under "Step 1: Select action(s)," select or deselect any Actions.
- 8. Under "Step 2: Edit the rule description (click an underlined value)," click an underlined value for any Action, and edit the value.
- 9. Click Next. This opens the Rules Wizard to the "Are there any exceptions?" screen.
- 10. Under "Step 1: Select exception(s) (if necessary)," select any necessary Exceptions.
- 11. Under "Step 2: Edit the rule description (click an underlined value)," click an underlined value for any Exception, and edit the value.
- 12. Click **Next**. This opens the Rules Wizard to the "Finish rule setup" screen. To apply your Rule retroactively to all messages in your Inbox, select the "Run this rule now on messages already in Inbox" checkbox.

Rules Wizard	×			
Finish rule setup.				
Step 1: Specify a name for this rule				
sadatrain.onmicrosoft.com on Yammer				
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 from <u>sadatrain.onmicrosoft.com on Yammer</u>				
move it to the <u>Yammer</u> folder and stop processing more rules				
Cancel < Back Next > Finish				

- 13. Click **Finish**. This closes the Rules Wizard.
- 14. To exit the Rules and Alerts window, click **OK**.

Part 4 - Remove a Rule

1. Select the Home tab in the top left corner, click the **Rules** button, and select **Manage Rules & Alerts**.

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FILE HO	ME SEND / RECEIVE	FOLDER VIEW			
New New Email Items •	ि Ignore ione Up → Delete ione Up → Delete	Reply Reply Forward In More *	! Action Required Image: Move to folder Image: Team Email ✓ Done ダ Create New	C To Manager	Rules • • • • • • • • • • • • • • • • • • •
New	Delete	Respond	Quick Steps	F2	Always Move Messages From: :
✓ Favorites Pipeline	<	Search Current Mailbox (Ctrl+E) All Unread	P Current Mailbox ▼ By Date (Conversations) ▼ Newest ↓ ▲	Reply Reply All C For Wed 5/28/2014	📻 Create R <u>u</u> le 🎦 Manage Ru <u>l</u> es & Alerts

2. This opens the Rules and Alerts window. Find the Rule you'd like to remove, and click the **Delete** button.

R	ules and Alerts	×
	E-mail Rules Manage Alerts	
	🔚 New Rule Change Rule 🔻 🗈 Copy 🔀 Delete 🔺 💌 Run Rules Now Options	
	Rule (applied in the order shown)	A
	sadatrain.onmicrosoft.com on Yammer	Ϋ́
	Vewsletter	ĬĬ.
	Vorthwind	iY
		T
	Dula description (disk an underlined value to edit)	
	Ruje description (click an underlined value to edity:	— II
	Apply this rule after the message arrives	
	from <u>sauatrain.onmicrosoft.com on Yammer</u>	
	and stop processing more rules	
	Enable rules on all messages downloaded from RSS Feeds	
_		(unantic
	OK Cancel	Арріу

3. This opens a confirmation window. Click **Yes**.



4. To exit the Rules and Alerts window, click **OK**.