

How to identify client-side Outlook rules and email signatures

Objective

This document provide instructions on how to identify client-side Outlook rules and email signatures as both these items wll NOT be migrated to Office 365. As such, these will need to be manually recreated once your mailbox is moved to Office 365. Please note the screenshots in this document reference Outlook 2013 but apply equally to Outlook 2007 and Outlook 2010.

Part 1 - Identifying client-side Outlook rules

Client-side Outlook rules are those which will only be processed when Outlook is open. This is because the rule contains an action or condition/exception that can only be performed by Outlook (as opposed to a server-side rule which is processed by an Exchange mail server). Examples of client-side Outlook rules includes moving messages to a local PST file, adding a category or a flag.

- 1. Open Outlook.
- 2. On the File menu choose Manage Rules and Alerts.



Rules and Alerts

Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

3. Client-side rules will have **(client-only)** specified after the rule name.

Rules and Alerts			×
E-mail Rules Manage Alerts			
📻 <u>N</u> ew Rule C <u>h</u> ange Rule 🗸 🖹 Copy 🗙 <u>D</u> elete 🔺	• <u>R</u> un Rules	Now <u>O</u> ption	s
Rule (applied in the order shown) Flag email (dient-only) I Delete DC003 Alerts	Actions		^
Rule description (click an underlined value to edit):			~
Apply this rule after the message arrives from <u>Adam Acevedo</u>			
flag message for <u>Follow up Today</u>			
Enable rules on all messages downloaded from RSS Feeds			
	OK	Cancel	Apply

4. Highlight the rule(s) and choose **Change Rule** \rightarrow **Edit Rule Settings**...



5. Make a note of the rule settings as these will need to manually created in your Office 365 mailbox.

Part 2 - Identifying Outlook mail signatures

Mail signatures will not be migrated to Office 365 amd as such will need to be manually recreated.

- 1. Open Outlook.
- 2. On the File menu choose Options, then Mail and Signatures

	Outlook Options	?	×
General	Change the settings for messages you create and receive.		^
Calendar	Compose messages		
People	Change the editing settings for messages.	Editor Options	
Tasks	Compose messages in this format: HTML V		
Search	ABC		
Language	Always check spelling before sending	Spelling and Autocorrect	
Advanced	Ignore original message text in reply or forward		
Customize Ribbon	Craste or medific right ure for merchaer	Signatures	
Quick Access Toolbar		Si <u>gn</u> atures	
	A14		

3. Make a note of your signatures. If possible, copy and paste your signature(s) to Microsoft Word document for reference so you can easily recreate them later when required.

Sign	atures and Stationery	1	? ×
-mail Signature Personal Stationery			
ele <u>c</u> t signature to edit	Choose default sig	nature	
Kevin Uy	E-mail <u>a</u> ccount:	Kevin.Uy@sadasystems.com	~
	New <u>m</u> essages:	Kevin Uy	~
	Replies/forwards	Kevin Uy	~
Delete New Save I	Rename		
dit signature	<u>condition</u>		
		🗏 🚨 <u>B</u> usiness Card 📑 🛃	
Kevin Uy			^
Solutions Engineer Microsoft Practice SADA Systems			
P: 818.766.2400 SADASystems.com			
Cloud Computing Managed Services Consulting Ap	p Development		
💦 🔽 📑 in 💾			
What can I be doing better?			
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