Managing your Inbox by Setting Rules

This document provides instructions for creating rules to help manage your e-mail messages in Microsoft Outlook 2007.

How Rules Help You Manage Your Inbox

A rule is an action that Outlook takes automatically on an arriving or sent message that meets the conditions that you specify. You can choose many conditions and actions by using the Rules and Alerts Wizard. Rules do not operate on messages that have been read, only on those that are unread.

Rules fall into one of two general categories: organization and notification. The Rules and Alerts Wizard contains templates for the most commonly used rules.

Stay organized These are rules that help you file and follow up on messages. For example, you can create a rule for messages from a specific sender, such as Bobby Moore, with the word "sales" in the **Subject** line, to be flagged for follow-up, categorized as Sales, and moved to a folder called Bobby's Sales.

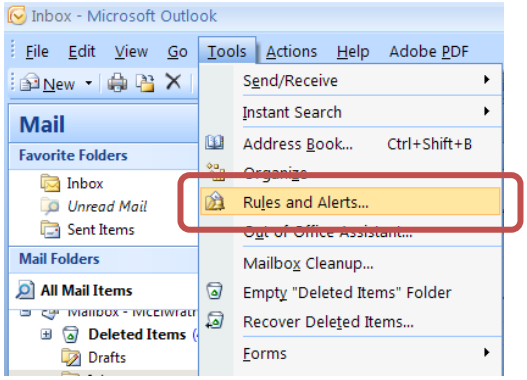
Stay up-to-date These are rules that notify you in some way when you receive a particular message. For example, you can create a rule that automatically sends an alert to your mobile telephone when you receive a message from a family member.

Start from a blank rule These are rules that you create from scratch.

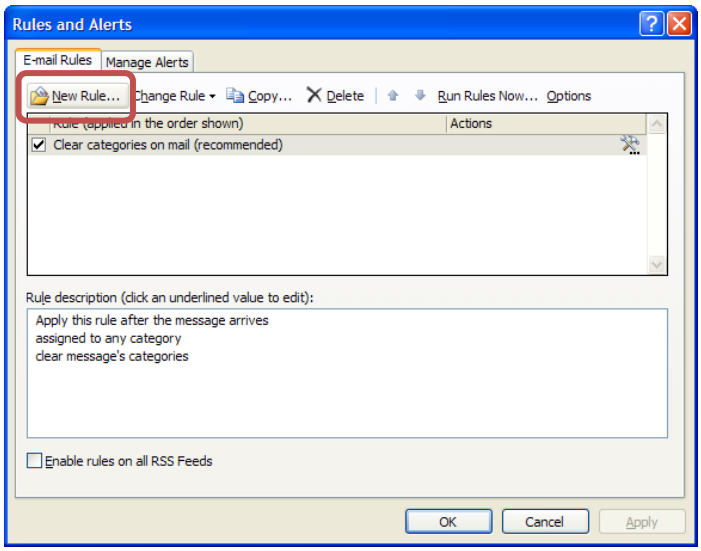
Creating Rules from a Template

Outlooks comes packaged with templates for creating commonly used rules.

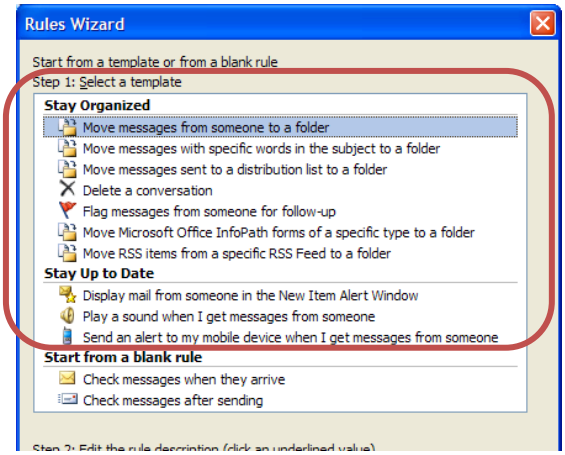
1. To create a rule based on a template, from the **Tools** menu, choose **Rules and Alerts**.



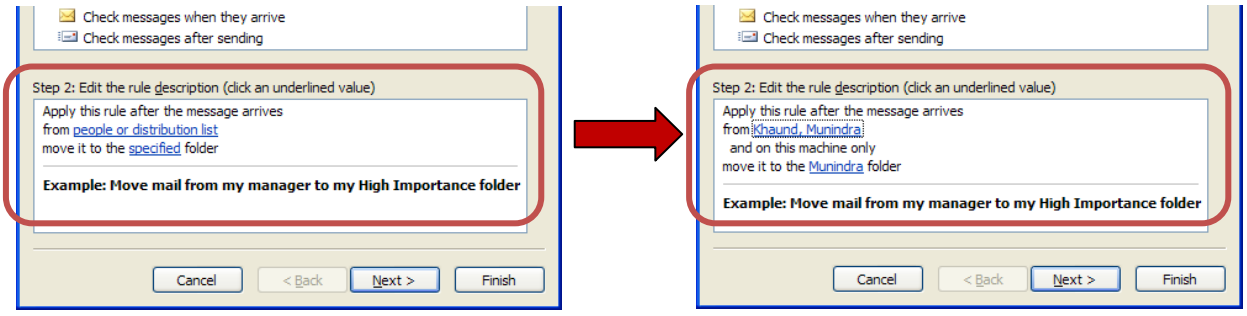
2. Click **New Rule**.



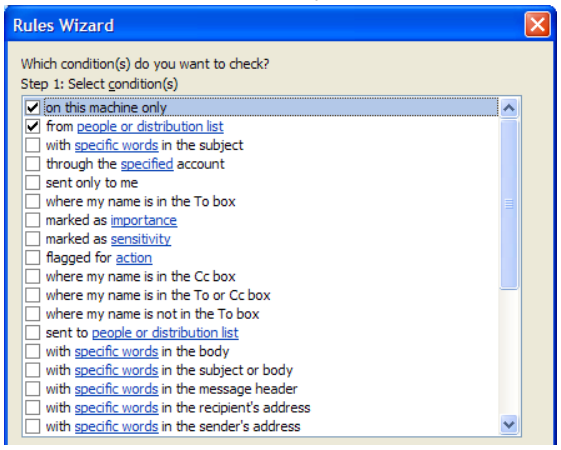
3. In **Step 1: Select a template**, select a template from the **Stay Organized** or **Stay Up to Date** collection of templates.



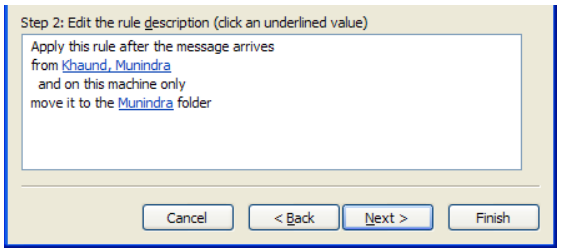
4. Under **Step 2: Edit the rule description**, click an underlined value. For example, if you click the **people or distribution list** link, the Address Book opens. Then click **Next**.



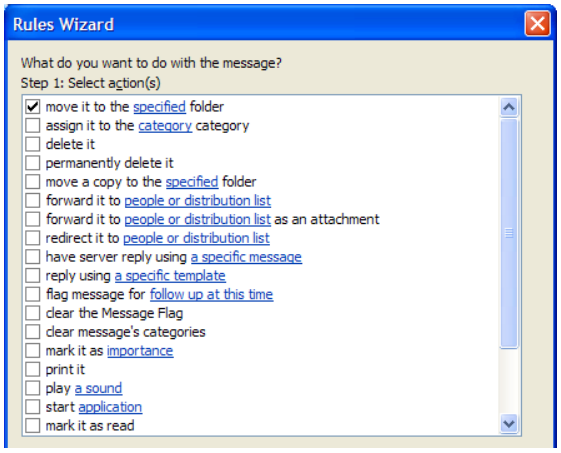
5. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.



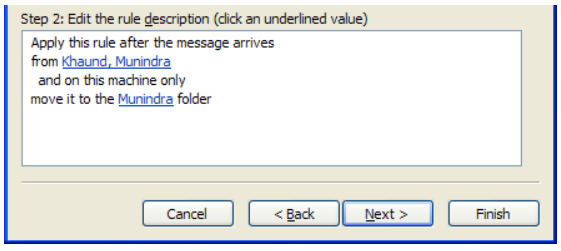
6. Under **Step 2: Edit the rule description**, click an underlined value if you did not do so in Step 4, and then click **Next**.



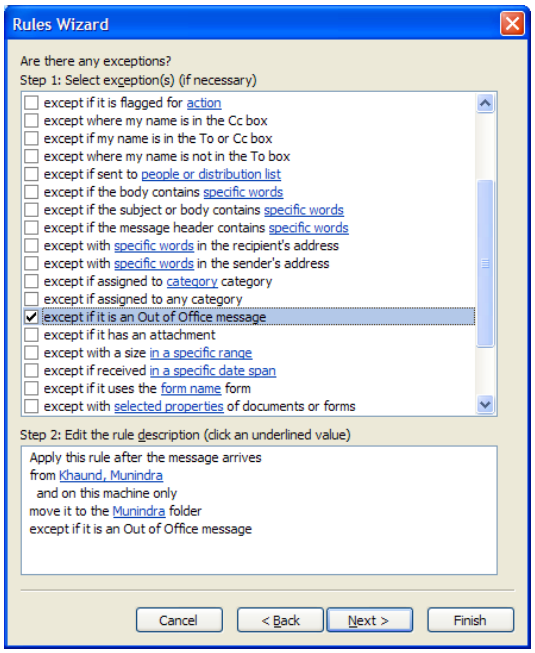
7. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.



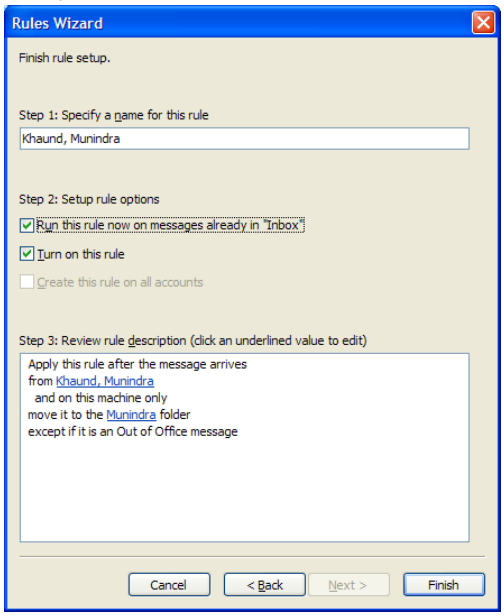
8. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.



9. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.



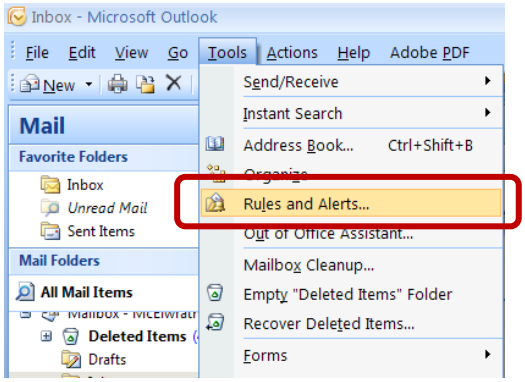
10. To finish creating the rule, enter a name for the rule, and then select any other options that you want. Click **Finish**.



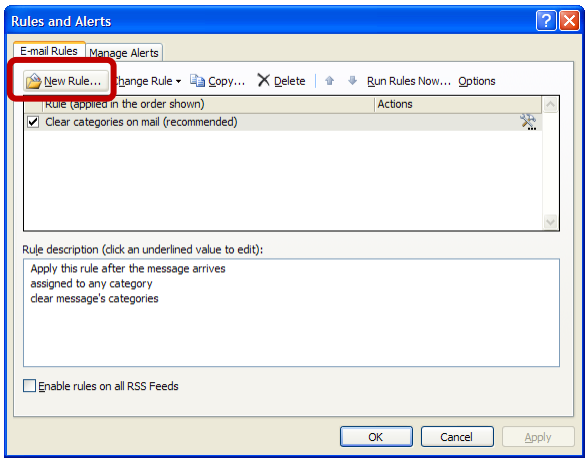
Creating Rules from Scratch

You can create a rule by choosing your own conditions, actions, and exceptions.

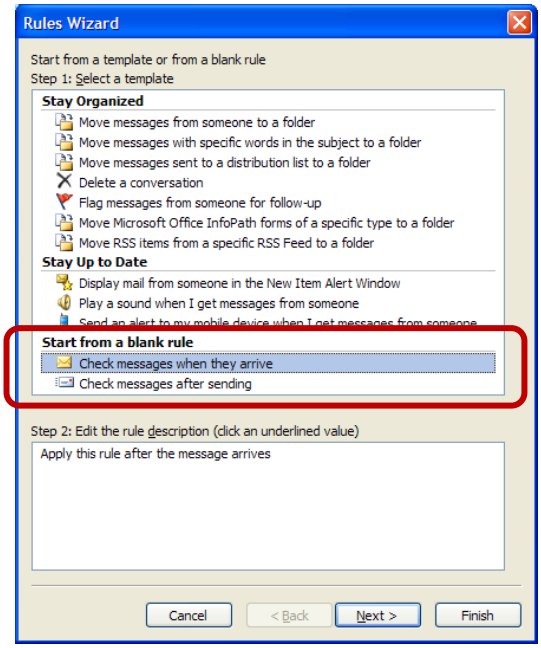
1. To create a rule from scratch, from the **Tools** menu, choose **Rules and Alerts.**



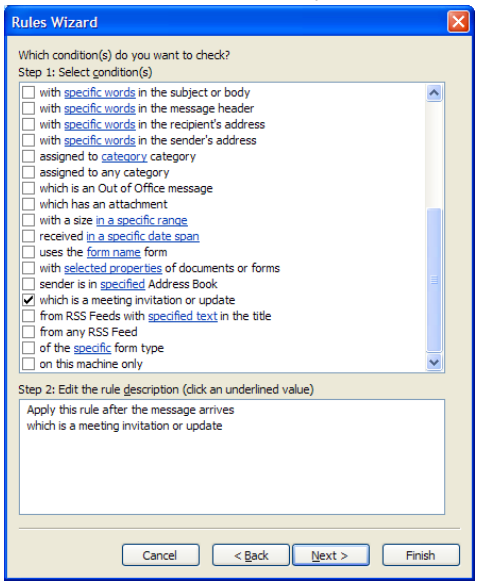
2. Click **New Rule**.



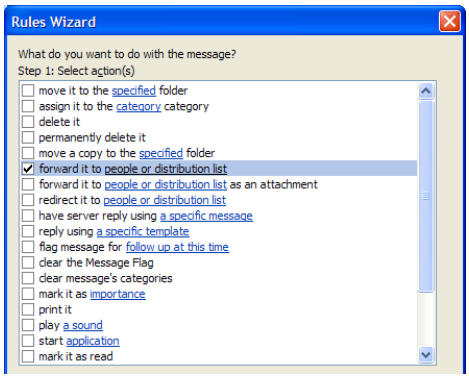
3. Under **Start from a blank rule**, select either **Check messages when they arrive** or **Check messages after sending**, and then click **Next**.



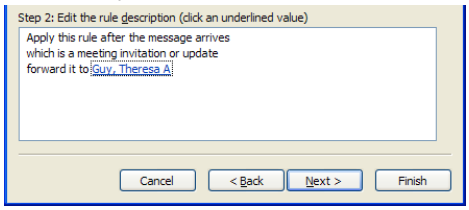
4. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.



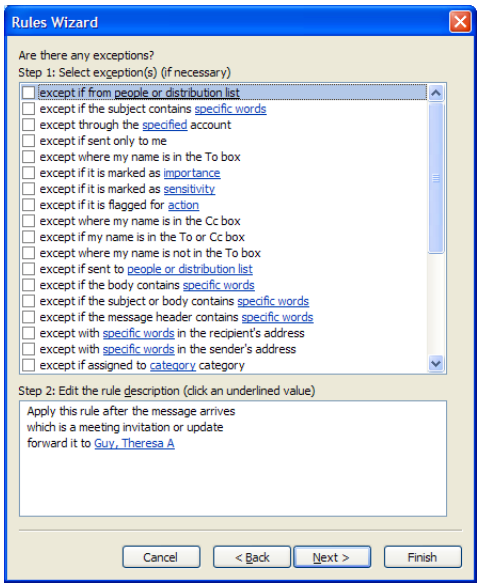
5. Under **Step 2: Edit the rule description**, click an underlined value if applicable, and then click **Next**.
6. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.



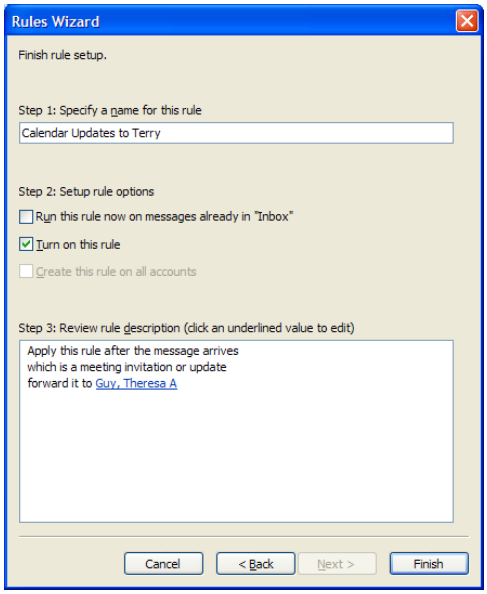
7. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.



8. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.



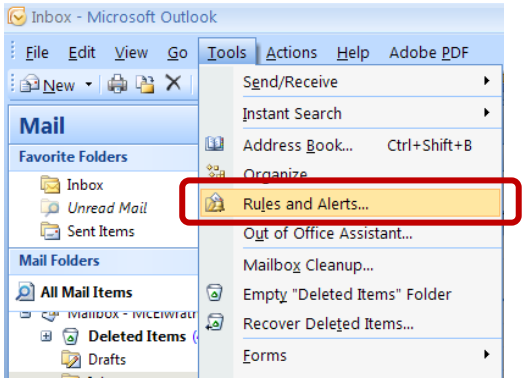
9. To finish creating the rule, enter a name for the rule, and then select any other options that you want. Click **Finish**.



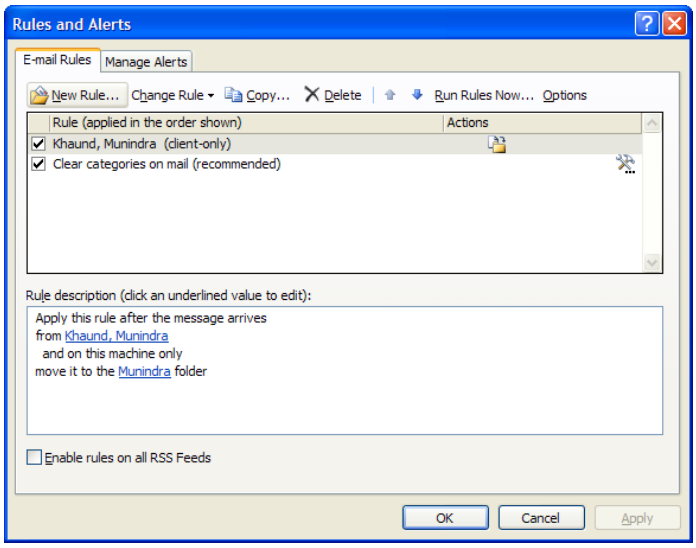
Managing Rules (turning on and off, deleting, copying)

Rules can be deleted, copied, edited, or turned off.

1. From the **Tools** menu, choose **Rules and Alerts**.



2. Use the dialog box to manage your rules.



   a. To delete a rule, select it and click the **Delete** button.
   b. To edit a rule, select it and click the **Change Rule** button.
   c. To turn off a rule, uncheck the box directly to the left of the rule name.
   d. To create a similar rule, select it and click the **Copy** button.

Special Note about Outlook at UIS

1. Each employee or student's mailbox is allotted 250 MB of e-mail storage space. Once that limit is reached, no e-mail can be sent or received until the mailbox is back under the 250 MB limit.
2. To assist you in staying within your space allotment, personal folders can be created. Messages stored in personal folders do not count towards your 250 MB.
   a. You may want to create rules that move messages to specific personal folders to assist in managing your mailbox size.
   b. Keep in mind that the contents of personal folders cannot be accessed through Webmail.