Creating rules to automatically manage email: Outlook 2013
Training and Documentation Team, September 2014 (Reviewed August 2015)

Overview
Help manage your email by creating Outlook Rules to automatically filter incoming messages into specific folders. You can even set up a rule to have all messages from a specific email sender or with a specific subject heading sent directly to your Deleted Items folder – useful for filtering junk mail.

Creating a new folder
You may want to create a new folder for messages filtered by your new Rule to be moved to.
1. Right-click on your Inbox and select New Folder… from the pop-up menu:
   ![Inbox with New Folder option highlighted]
   You can also create a sub-folder within an existing folder. Just right-click on the existing folder within your Inbox and select New Folder… from the pop-up menu.
2. Give your new folder a name:
   ![Folder creation screen]
3. Click OK. The new folder is listed alphabetically in your folder or sub-folder.

Creating a rule to move messages
1. Click the File tab on the ribbon.
   ![File ribbon]
2. Click Manage Rules & Alerts:
   ![Manage Rules & Alerts dialog]
3. The Rules and Alerts dialog opens. Click New Rule…
   ![Rules and Alerts dialog with New Rule option highlighted]
4. The Rules Wizard opens. Select Apply rule on messages I receive then click the Next > button:
5. Under **Step 1: Select condition(s)**: Select the condition(s) you want to use to govern your rule.

   ![Step 1: Select condition(s)](image)

   If a condition includes blue underlined text, you can set additional options in the **Step 2** section of the dialog box, as described below.

6. Under **Step 2: Edit rule description**: Click the blue underlined text to set additional options for a condition. A dialog box will appear allowing you to edit the rule further; the type of dialog box will depend on the condition you have selected.

   ![Step 2: Edit rule description](image)

   For example, if you selected **from people or public group** as one of your conditions, clicking on the associated underlined text will launch the **Rule Address** dialog where you can either search the Global Address List for a University email address, or type an external email address into the **From** field.

7. Enter the required information and click **OK**.

   The Step 2 value box lists the criteria for the rule. If you change your mind about any of them, either click the blue underlined text and reset the options, or deselect the checkbox in the Step 1 list to remove the criteria completely.

8. Click **Next** to move to the next stage of the **Rules Wizard**.

9. Under **Step 1: Select action(s)**: Click the checkbox for **move it to the specified folder**.

10. Under **Step 2: Edit the rule description**: Click the blue underlined text to specify the folder you want to use. This could be a new folder created specifically for your rule (as described on page 1 of this fact sheet), or any other folder of your choice, including the Deleted Items folder.

   ![Step 2: Edit the rule description](image)

11. Click **OK**.

12. Click **Next** to move to the next step of the **Rules Wizard**.

13. Under **Step 1: Select exception(s) (if necessary)**: If you want, you can tick the checkbox(es) next to any exceptions you want to set.

14. Click **Next**.
15. **Under Step 1: Specify a name for this rule:** Type a name for the rule that will allow you to easily identify it if you need to edit it or deleted it at a later date.

   ![Specify a name for this rule]

16. **Under Step 2: Setup rule options:** Make sure the **Turn on this rule** checkbox is ticked.

   ![Setup rule options]
   
   If you would like to run the rule as soon as you’ve completed the setup, tick the **Run this rule now on messages already in “Inbox”** checkbox.

17. **Under Step 3: Review rule description:** Check that the rule settings are what you need. If not, use the `< Back` button to return to the relevant section of the Rules Wizard to edit your rule settings.

18. Click **Finish** to complete setting up the rule.

   ![Finish]
   
   The rule will process messages as they arrive in your inbox and will file them according to your criteria.

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**Managing Rules**

1. Click the **File** tab on the ribbon.

   ![File tab]

2. Click **Manage Rules & Alerts**.

   ![Manage Rules & Alerts]

3. The **Rules and Alerts** dialog opens. Click the rule you want to edit.

   ![Rule dialog]

4. To delete a rule entirely, click the **Delete** button.

   ![Delete button]

5. To edit a rule, click the **Change Rule** button.

   ![Change Rule button]

6. Click **Edit Rule Settings** from the drop-down menu.

   ![Edit Rule Settings]

7. Set the options you need moving through the **Rules Wizard**, as described previously.

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**Further information and help**

Contact the Service Desk: [https://myit.abdn.ac.uk](https://myit.abdn.ac.uk)