Staff email – Inbox Rules

This guide steps your through creating and using Rules in the **Outlook desktop** client. See Microsoft's support site for guidance on creating Inbox rules in OWA.

Overview

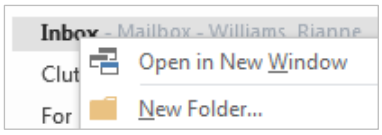
Help manage your email by creating **Outlook Rules** to automatically filter incoming messages into specific folders. You can even set up a rule to have all messages from a specific email sender or with a specific subject heading sent directly to your Deleted Items folder – useful for filtering junk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

In this guide, we step you through creating a Rule to filter messages from a specific person, but the principles are the same for any rule you may want to create.

Creating a new folder

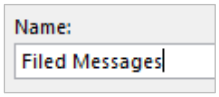
You may want to create a new folder to move messages filtered by your new Rule into.

1. Right-click under the relevant mailbox name (your own or shared) - **not** the Inbox and select **New Folder…** from the pop-up menu:



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**:



3. Click **OK**. The new folder is listed alphabetically in your folder or sub-folder.

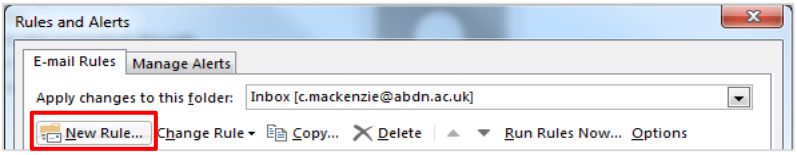
Creating a rule to move messages

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

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

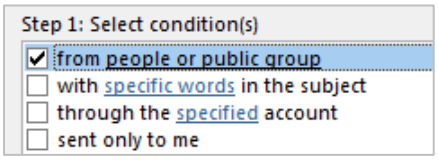
3. The Rules and Alerts dialog opens. Click **New Rule…**

The University of Aberdeen is a charity registered in Scotland, No SC013683



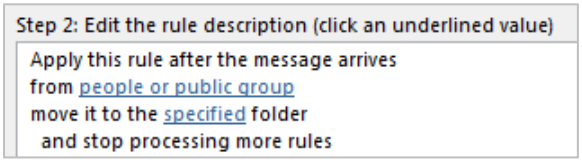
4. The Rules Wizard opens. Select **Apply rule on messages I receive** then click **Next**:

5. Under **Step 1: Select condition(s)**, select the condition(s) you want to use to govern your rule.



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.



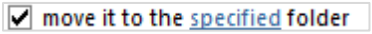
For example, if you selected from **people or public group** as one of your conditions, clicking on the associated underlined text will launch the **Rule Address** dialog where you can either search the Global Address List for a University email address, or type an external email address into the From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

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

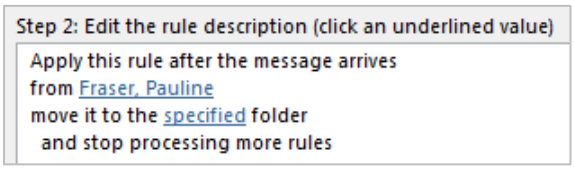
The **Step 2** value box lists the criteria for the rule. If you change your mind about any of them, either click the blue underlined text and reset the options, or deselect the checkbox in the **Step 1** list to remove the criterial completely

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

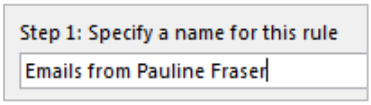
9. Under **Step 1: Select action(s)**, click the checkbox for move it to the specified folder.



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 guide), or any other folder of your choice, including the Deleted Items folder.



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 appropriate, tick the checkbox(es) next to any 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.



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

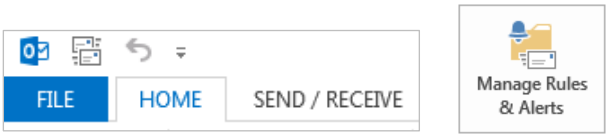
> If you would like to run the rule as soon as you've completed the setup, tick the **Run this rule now on messages already in "Inbox"** checkbox.

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.

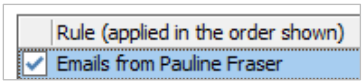
> The rule will process messages as they arrive in your inbox and will file them according to your criteria.

Managing Rules

1. **Click** the **File** tab on the ribbon, the click **Manage Rules & Alerts**.



2. The **Rules and Alerts** dialog opens. Click the rule you want to manage.



3. To delete a rule entirely, click **Delete**.

4. To edit a rule, click **Change Rule**.

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

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

Further information and help

Contact the Service Desk: https://myit.abdn.ac.uk