

How to create Rules in MS Outlook

- *Have your email auto-sorted for you!*
- *Know what to tackle first and what can be a lower priority!*
- *Understand the assistance and the limits of this feature*

What this covers...

- What are “Rules”?
- Why should I bother? What do they offer?
- What are the limits of this tool?
- Step-by-step of how to create Rules for email using a unit organizational chart as a model

What are Rules?

- A “Rule” in the context of email is just what the word means. It’s a guideline that you – the user – tell Outlook that you want it to do to specific emails.
- This can be specific senders or specific Subject line, and the result is you can always have those messages sent to a specific folder.

Why should I bother?

- Have you ever just briefly sat down at your desk and started to sort through your inbox of emails, and then The Boss pops in to ask about that one email that you didn't even know you had yet?
- Creating Rules for your email means that you are able to prioritize your email. Prioritizing email means prioritizing efforts!
- What all that means is you can look at the emails that will probably require your awareness or action first, and then handle the other new emails in order of priority.

What do they offer?

- Why take time to set up Rules? Isn't it the same output as if I manually sort them?
 - Yes, it's the same output as manually sorting them. But instead of first having to sort emails before you can read them and then act on them, you can simply start reading and acting!

What are the limits of this tool?

- The Rules are only as good as you make them.
- Rules that contradict each other could cause you to not receive an email.
- You might have a Rule for someone in one destination folder, and then have to move them to a new destination later. This can create inefficiencies.

What are the limits of this tool?

...and how to counterbalance those limits.

- The Rules are only as good as you make them.
 - Before you create Rules, plan out how to build a hierarchy and folder layout (e.g. based on unit organization).
- Rules that contradict each other could cause you to not receive an email.
 - Don't have more than one Rule per person
- You might have a Rule for someone in one destination folder, and then have to move them to a new destination later. This can create inefficiencies.
 - If you do have to switch a Sender's emails from one destination to another, then update the rule, but then only divert future emails (leave the old emails in the location they're in).

7 Steps to create Rules based on a unit organizational chart:

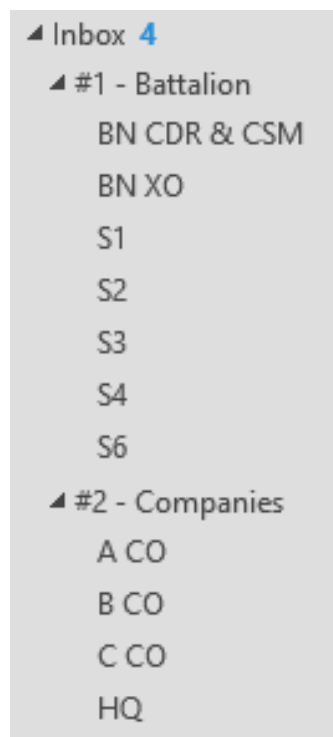
1. Gather your resources
 - Unit Organizational Chart
 - Chain of Command roster
 - Email Addresses / full names of persons who send you emails whom you wish to sort those emails upon receipt

7 Steps to create Rules based on a unit organizational chart:

2. Build sub-sections within your Inbox. These will become the places you have Outlook auto sort your incoming emails.

To create a sub-folder, right-click on any Folder, then immediately name it something descriptive.

The Folder you selected to right-click becomes the Parent folder to that new one. To move the arrangement of folders, select and drag the folder to the order of your choice within your Outlook hierarchy.

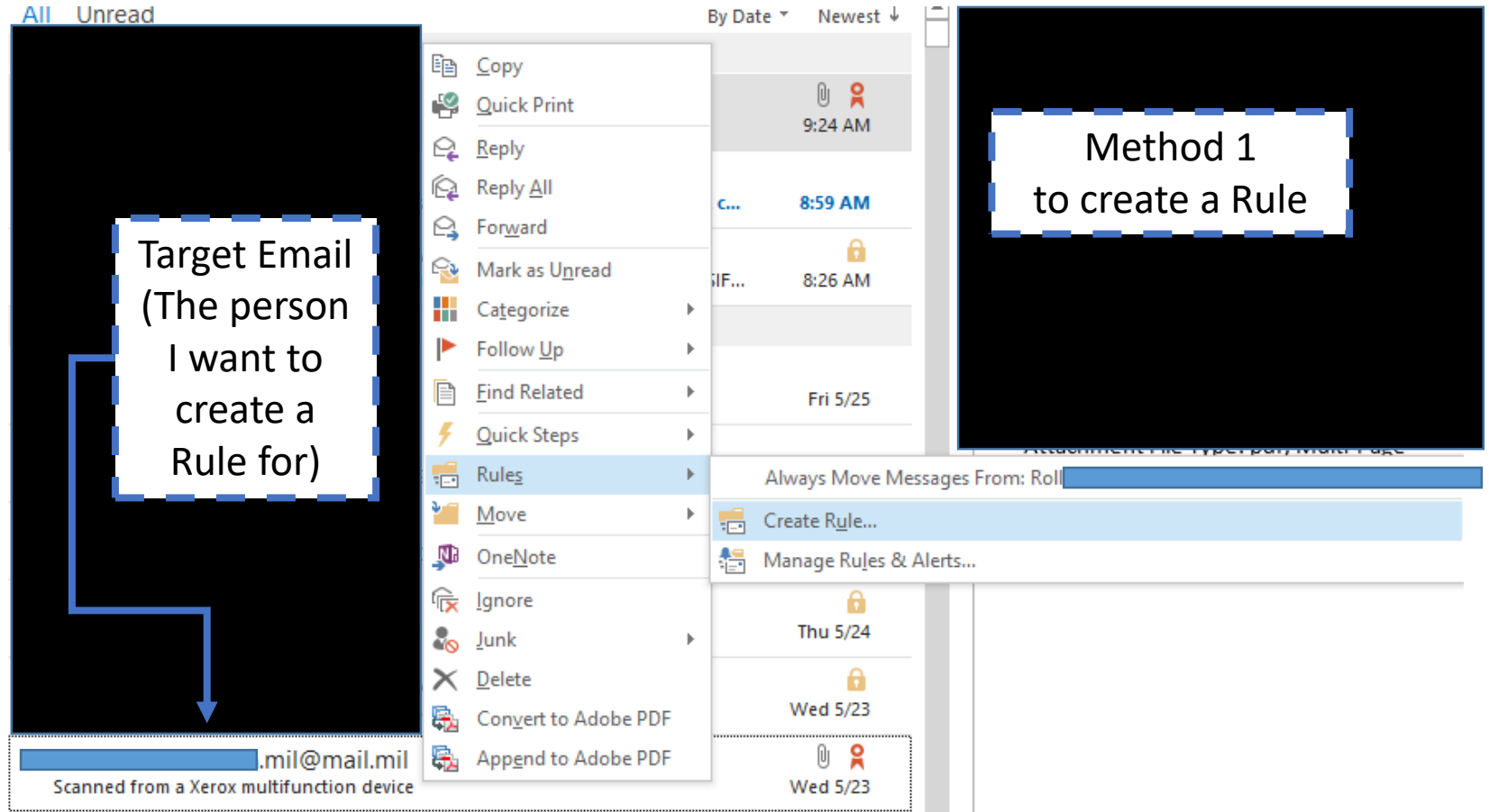


This is an example of what your inbox hierarchy might look like if you're mimicking your unit task organization to sort your emails.

7 Steps to create Rules based on a unit organizational chart:

3. Once you have a place for all these emails to go to, it's time to start building Rules!

There's a few ways to start a new Rule, but the easiest is to right-click on any email from the sender that you want to sort emails from, and then navigate to the Rules menu.

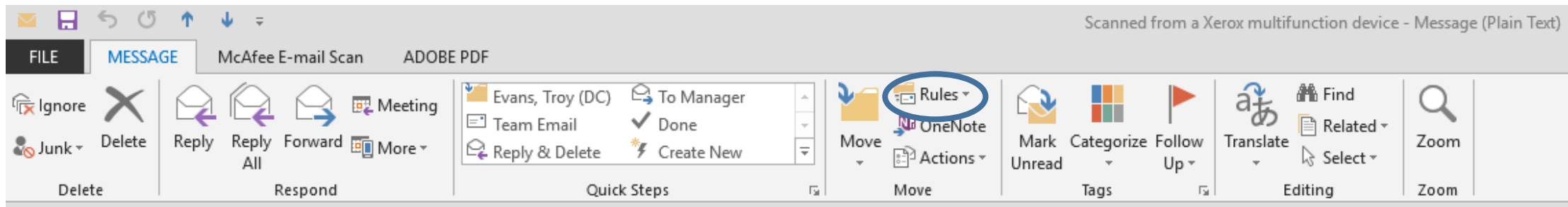


7 Steps to create Rules based on a unit organizational chart:

Method 2
to create a Rule

Opening a received email and
selecting the Rules drop-down
menu is another method.

Both take you to the same menu.

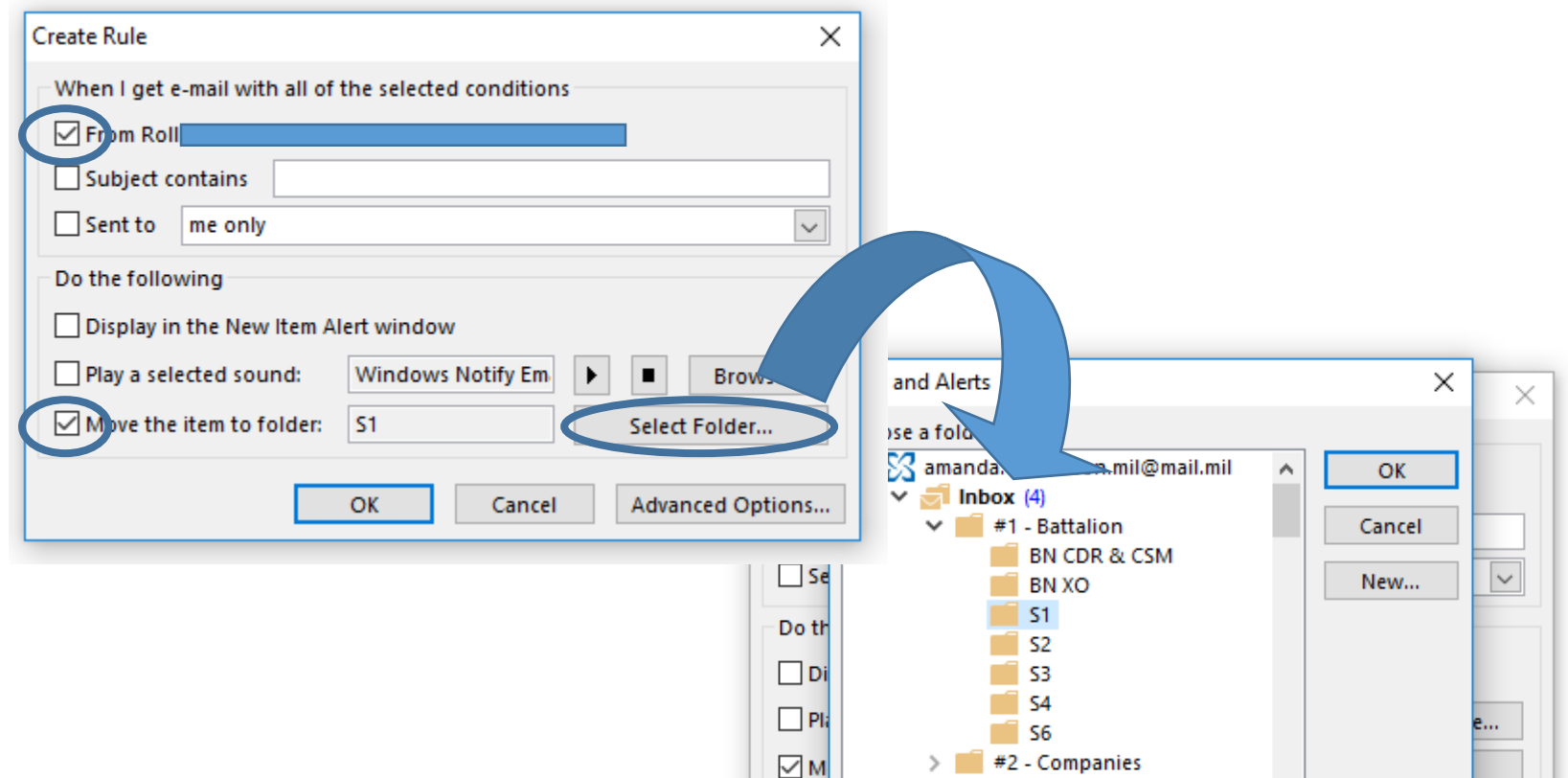


7 Steps to create Rules based on a unit organizational chart:

4. When creating a Rule, select whether you want the email to move from your Inbox to a certain folder because of who is sending it (“FROM”), or because of what they’re talking about (“SUBJECT”).

Then, decide where you will ask Outlook to send these emails.

Once done, select “OK”.

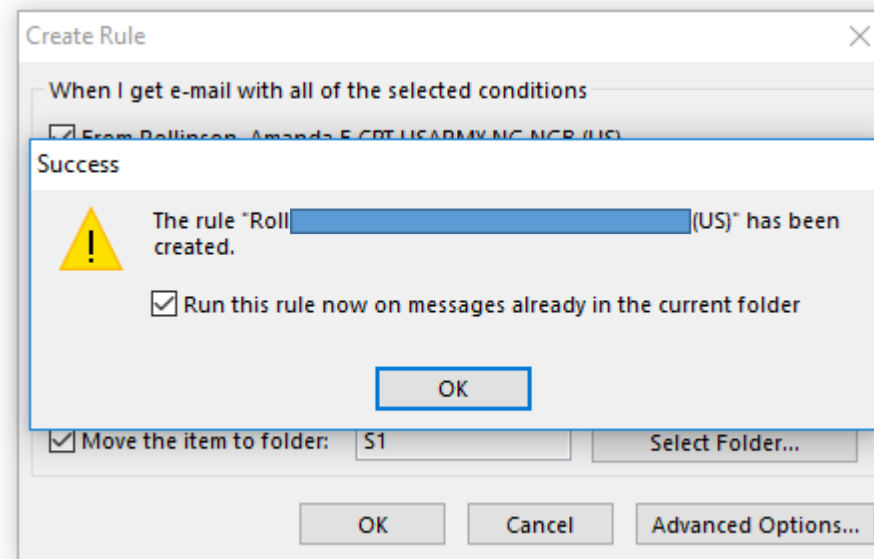


“Select Folder” shows your Inbox and its subfolders, and allows you to select the folder that you want the emails from this Sender to automatically move to.

7 Steps to create Rules based on a unit organizational chart:

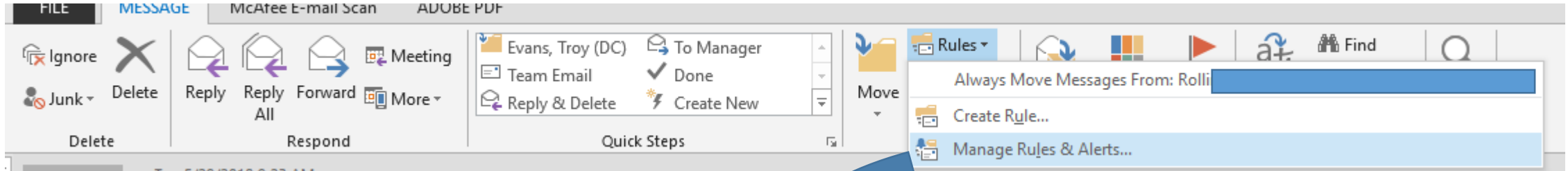
5. After you click “OK” and the Rule runs, this window will pop up and inform you that the Rule has been successfully created.

Repeat steps #1-5, as needed.



Checking this box puts all the emails from this sender into the same Folder.

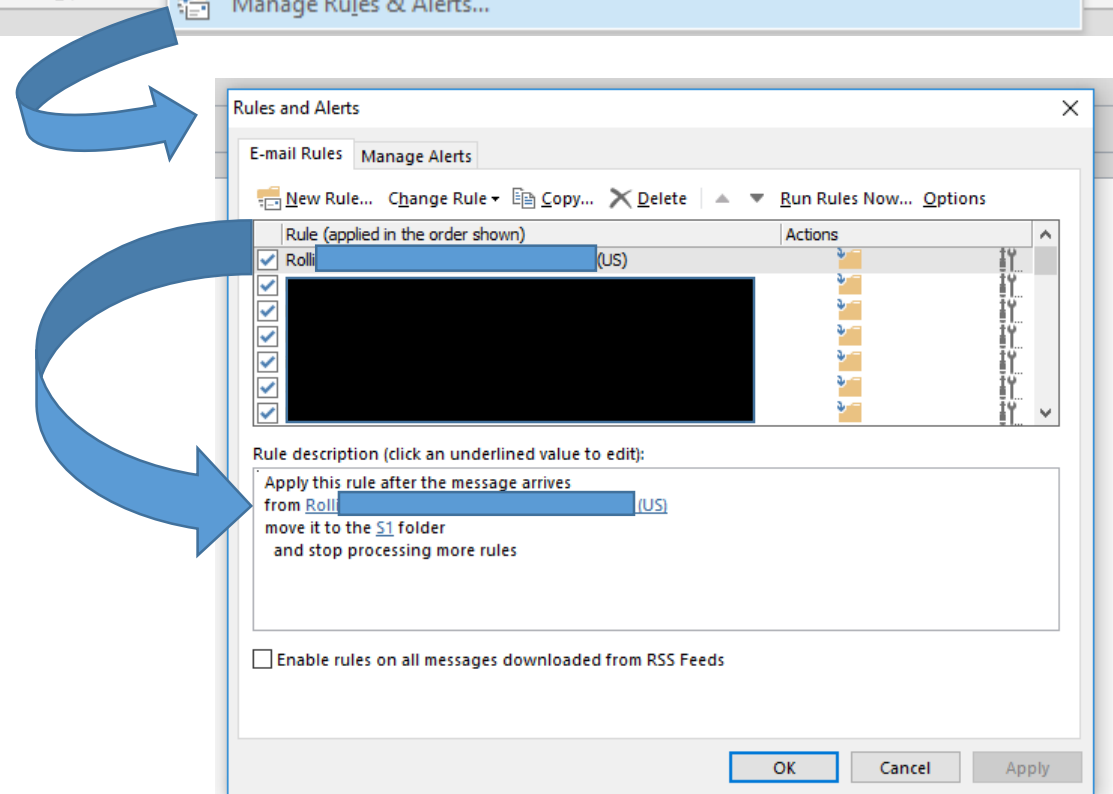
7 Steps to create Rules based on a unit organizational chart:



6. After you create all your Rules, you may need to manage them as some point. Instead of “Create Rule,” select “Manage...”

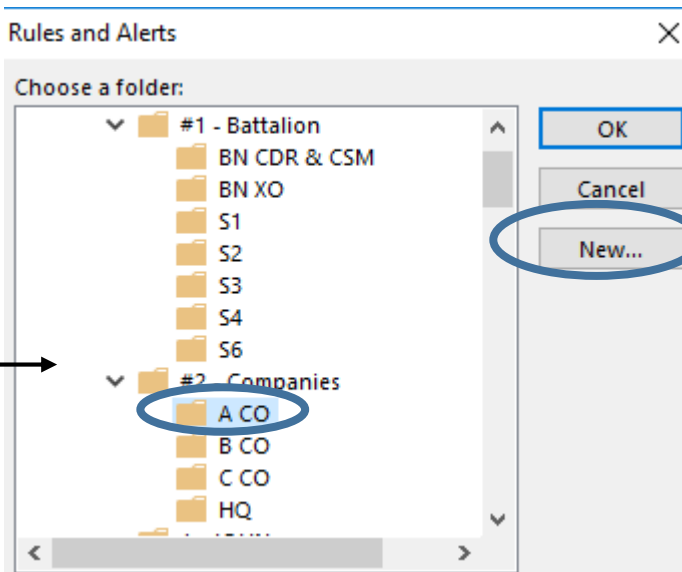
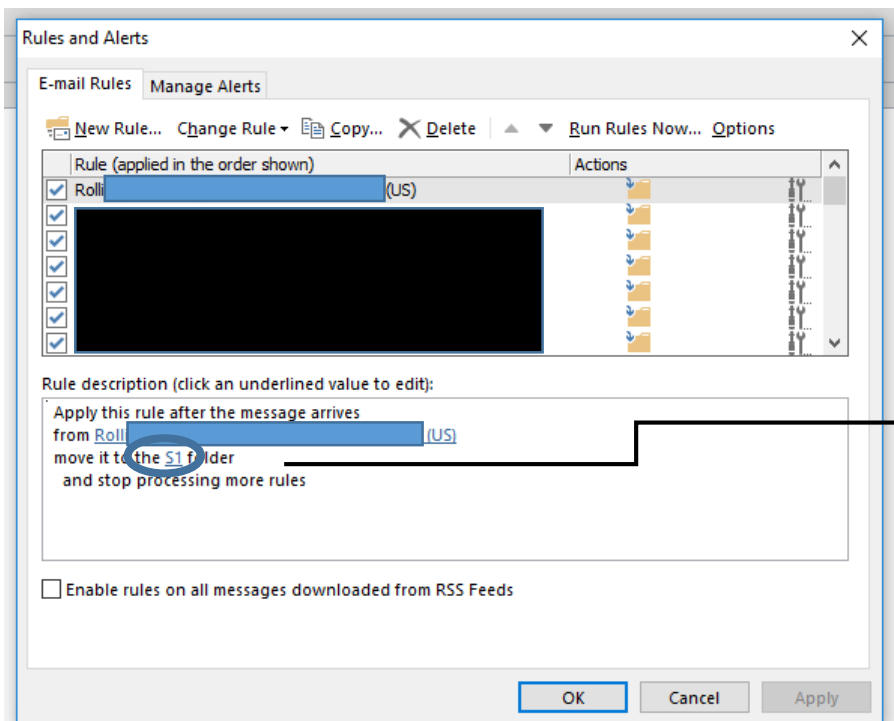
Each Rules you created is listed. If you select a Rule (e.g. a name), then you will see where Outlook thinks that it should be routing that person’s email to you.

So what do you do if that location for a Rule is now incorrect or irrelevant?



7 Steps to create Rules based on a unit organizational chart:

7. If you realize that the location / destination folder is no longer relevant, then simply select the hyperlinked folder, and select a new destination



If you need to, create a new sub-folder from this menu. It will show immediately and you can add that new location as the new destination for the Rule you are editing.

(ex: D CO needed to be added to the Company sub-folder listing).

Summary

- MS Outlook Rules help you work more efficiently!
- Maintain the Rules, and they'll help you maintain your work.