# Magistrates Conference
Microsoft Outlook – Creating Folders, Creating Rules, Using OWA Presentation

Creating Outlook Folders:

Folder Tab – Folder ribbon tab, New Group, New Folder tool.

Select the tool to get the Create New Folder pop-up. Name the folder, leave the default "Mail and Post Items" for contains, and leave the default "Inbox" selected for the location. Select the "OK" button at the lower-right of the pop-up. The folder is now created.
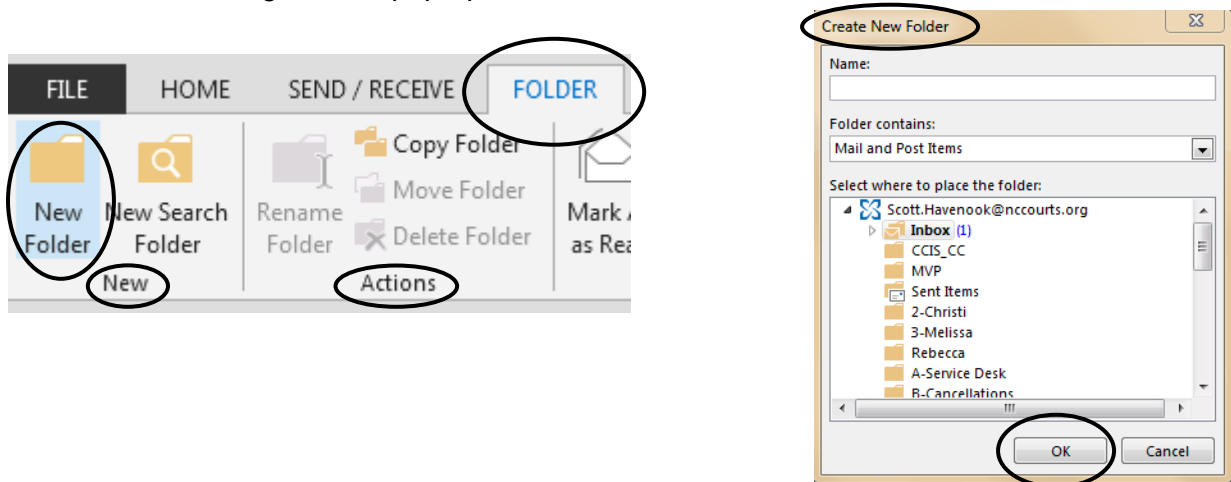
OR;

Right Click "Inbox" in the Folders list, Select the New Folder option and a blank field will appear. This is the folder Name Box. Type in the name of the folder and Select the "Enter" key on your keyboard. OR;

Right Click existing Folder in the Inbox will also have a "New Folder" option. This will allow you to create sub-folder within the folder you have selected.
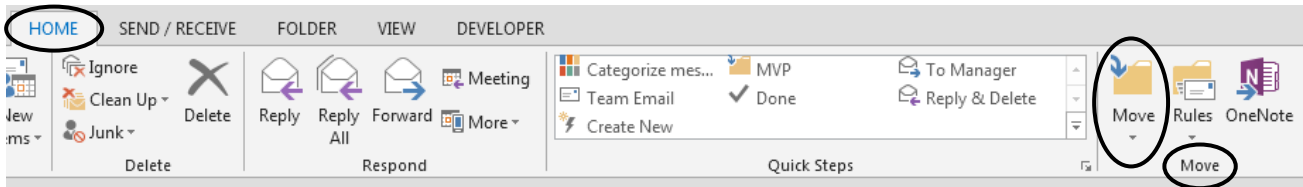
Move/Copy Folders: From the Folder Ribbon Tab, Actions Group, the Move, Copy, Rename, and Delete tools are all available.

OR

Right Click a folder, from the Drop-Down Menu you can Select the Move Folder option and Copy Folder option.

OR

Left Click and Hold to Drag and Drop a Folder Up or Down the Folder List, or In and Out of other Folders.

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Move/Copy Email between Folders: From the Home Tab, Move Group, Select the Move tool. You will get a drop-down menu to select the location you want to Move the email(s) to. There are also options to Copy the email(s) and to select any folder that is not currently on the drop-down list.

OR

From the View Pane (email list), Left Click and Hold, then Drag and Drop the selected email into the desired folder.

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Creating Rules:

A Rule is an action that will be taken automatically on Incoming or Outgoing emails.
From the Home Tab, Move Group, Select the Rules tool. A drop-down menu will display with three options. These options are Always Move, Create Rule, and Manage Rules and Alerts.
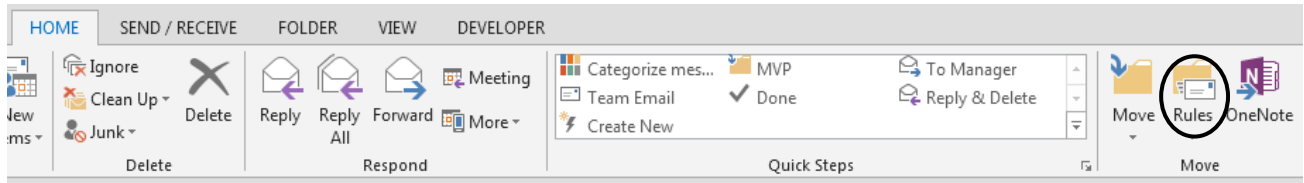

Select the Create Rule option.
The Create Rule pop-up window will appear. You can create a simple rule for the email you have selected (highlighted). There are two sections, the "when I get…" in the upper section, and the "Do the Following" in the lower section. By checking the boxes for the desired actions and Selecting the OK button at the bottom of the pop-up, you have just created a simple Rule.
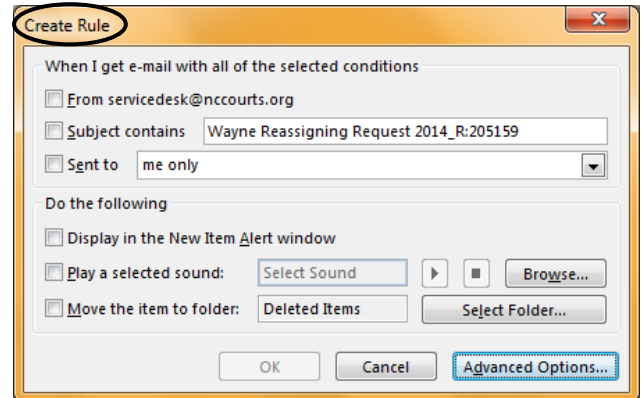
To create a more advanced rule Select the Advanced Options button on the lower Right of the pop-up. This will open the Rules Wizard where you can create everything from simple to very complex rules.

The wizard allows you to select many options, and also lets you select exceptions to you rule. There are two sections to each page of the Rules Wizard. The top section is where you make selections by checking boxes. The bottom section will display the underlined value from the checked option to allow you to choose a specific item within *your* email. When you have made your selections from the page you can either Select the Next button at the bottom of the Wizard to take you to the next page and set of options, or you can select the Finish button at the bottom of the Wizard to indicate you are done and create the rule with the options you have selected.

Once finished you will get the option to run this rule on all emails currently in your mailbox.
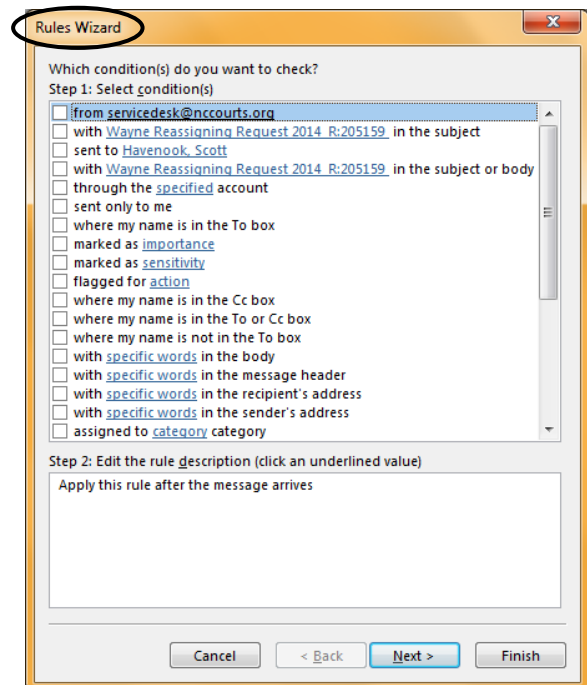
Another option is to Right Click an email to get an options list. There are two options for creating rules:

The Ignore option, which sets up a simple rule to move all emails from the sender to the Deleted items folder. Very handy for "Junk" emails.
The Create Rule option opens the same pop-up covered on the previous page.

Using OWA:

OWA stands for Outlook Web App and is the web based version of AOC's Outlook. OWA is created on Outlook 2010 so it is different from the Outlook on your state PC, which is Outlook 2013. Since it is web-based it does not have all the features found on the desktop version but it is robust enough to handle daily email conversations.

The log in is from any web site, the URL is https://owa.nccourts.org. The log –in screen looks like this:

Choose the appropriate security option. The Domain will be AOC\ and the user name and Password is your Windows log-in.
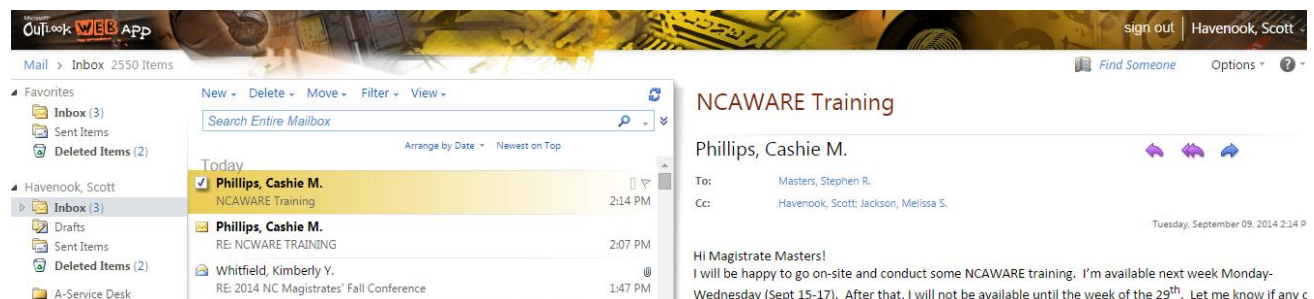
Once logged in everything is very similar to the desktop version. All the desktop options for Folders and Rules are available using the Right Click methods discussed previously.
This is the AOC Outlook version that can be configured on your smart phone.

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Manage email messages by using rules

A rule is an action that Microsoft Outlook runs automatically on incoming or outgoing messages, based on conditions that you have specified.

Using Outlook Web App, instead? See Inbox rules to learn about creating and managing your rules that will also work with the Outlook desktop program.
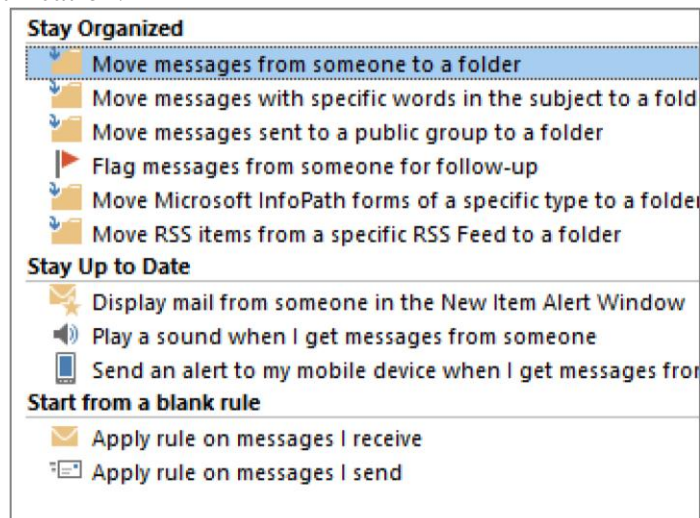
In this article

How rules help you manage email messages

Rules help reduce manually filing or taking the same action when a similar message arrives. Unlike Quick Steps, rules typically are always on and run automatically. For example, when a message is received from a specified person, it's automatically moved to the folder that you designate.

The Rules Wizard helps you design rules to manage messages. Rules fall into one of two categories — organization and notification.

Stay Organized
- Move messages from someone to a folder
- Move messages with specific words in the subject to a fold
- Move messages sent to a public group to a folder
- Flag messages from someone for follow-up
- Move Microsoft InfoPath forms of a specific type to a folder
- Move RSS items from a specific RSS Feed to a folder

Stay Up to Date
- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from

Start from a blank rule
- Apply rule on messages I receive
- Apply rule on messages I send

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The Rules Wizard includes templates for the most frequently used rules, which include the following:

- **Stay Organized**   These rules help you file and follow up on messages. For example, you can create a rule for messages from a specific sender, such as Anne Weiler, with the word "sales" in the **Subject** line, to be flagged for follow-up, categorized as Sales, and moved to a folder named Anne's Sales.
- **Stay Up to Date**   These rules notify you in some way when you receive a particular message. For example, you can create a rule that automatically sends a message to a mobile device when you receive a message from a family member.

- **Start from a blank rule**   These are rules that you create without the aid of a rule template and that you can completely customize.

Create a rule

Outlook includes rule templates for common scenarios. Use these rule templates, or create design your own custom rules.

Use Outlook rule templates

1. Click the **File** tab.

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

3. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, click **New Rule**.

4. Under **Step 1: Select a template**, select the template that you want from the **Stay Organized** or **Stay Up to Date** collection of templates.

5. Under **Step 2: Edit the rule description**, click an underlined value. For example, if you click the **people or public group** link, the Address Book opens.

6. Click **Next**.

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

8. Under **Step 2: Edit the rule description**, click an underlined value for any condition that you added, and then specify the value.

9. Click **Next**.

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

11. Under **Step 2: Edit the rule description**, click an underlined value for any action that you added, and then specify the value.

12. Click **Next**.

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

14. Under **Step 2: Edit the rule description**, click an underlined value for any exception that you added, and then specify the value.

15. Click **Next**.

16. Under **Step 1: Specify a name for this rule**, enter a name.

17. Under **Step 2: Setup rule options**, select the check boxes for the options that you want.
    • If you want to run this rule on messages that already are in the **Inbox**, select the **Run this rule now on messages already in "Inbox"** check box.

    • By default, the new rule is turned on. To turn off the rule, clear the **Turn on this rule** check box.

    • To apply this rule to all email accounts set up in Outlook, select the **Create this rule on all accounts** check box.

18. Click **Finish**.

Design a custom rule

1. Click the **File** tab.

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

3. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, click **New Rule**.

4. Under **Start from a blank rule**, click either **Check messages when they arrive** or **Check messages after sending**.

5. Click **Next**.

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

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7. Under **Step 2: Edit the rule description**, click an underlined value for any condition that you added, and then specify the value.

8. Click **Next**.

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

10. Under **Step 2: Edit the rule description**, click an underlined value for any action that you added, and then specify the value.

11. Click **Next**.

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

13. Under **Step 2: Edit the rule description**, click an underlined value for any exception that you added, and then specify the value.

14. Click **Next**.

15. Under **Step 1: Specify a name for this rule**, enter a name.

16. Under **Step 2: Setup rule options**, select the check boxes for the options that you want.

    • If you want to run this rule on messages that already are in the **Inbox**, select the **Run this rule now on messages already in "Inbox"** check box.

    • By default, the new rule is turned on. To turn off the rule, clear the **Turn on this rule** check box.

    • To apply this rule to all email accounts set up in Outlook, select the **Create this rule on all accounts** check box.

17. Click **Finish**.

Create a rule based on senders or recipients of a message

A rule can be quickly created from any message. The advantage of this method is that rules are suggested based on the message sender or recipients. For example, when you start with a message, one rule that is suggested moves all messages from that sender to a folder that you choose.

1. Click the message for which you want to create a rule, and then on the **Home** tab, in the **Move** group, click **Rules**.

   Suggested rules appear based on the message sender and recipients.

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2. Do one of the following:

   - Click one of the suggested rules, click a destination folder, and then click **OK**.

   - For more rules options that are based on the sender, recipients, or subject of the message, click **Create Rule**.

If you chose **Create Rule** in step 2, the **Create Rule** dialog box appears. Continue with the following steps.

1. Under **When I get e-mail with all of the selected conditions**, select the check boxes for the conditions that you want.

2. Under **Do the following**, select the check boxes for the action that you want the rule to take when the specified conditions are met.

3. Select the **Move the item to folder** check box.

4. Click an existing folder or click **New** to create a folder to store the messages.

   To add more conditions, actions, or exceptions to the rule, click **Advanced Options**, and then follow the rest of the instructions in the **Rules Wizard**. This is the same wizard that appears when you click **Manage Rules & Alerts** in the Backstage view (by clicking the **File** tab). See Design a custom rule for more information.

5. Click **OK**.

Import or export rules

See Import or export a set of rules to learn how to import or export rules so that others can use them.

Delete a rule

When a rule is no longer necessary, here's how to delete it:

1. Click the **File** tab.

2. Click **Manage Rules & Alerts**.
3. Select the rule you want to delete.

4. Click ✕ **Delete**.

5. Click **OK**.

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Run rules manually

If you want to manually run one or more rules, do the following:

1. Click the **File** tab.

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

3. Click **Run Rules Now**.

4. In the **Run Rules Now** dialog box, under **Select rules to run**, select the check box next to each rule that you want to run.

5. In the **Run in Folder** box, if you want to select a different folder, click **Browse**, click the folder, and then click **OK**.

   Select the **Include subfolders** check box to include all folders under the folder that was specified in step 5.

6. In the **Apply rules to** list, the default is all messages. You can change this to read or unread messages.

7. Click **Run Now**.

Server-based rules versus client-only rules

There are two types of rules in Outlook — server-based and client-only.

- **Server-based rules**   When you are using a Microsoft Exchange Server account, some rules are server-based rules. These rules run on your mailbox on the Exchange mail server, even when Outlook isn't running. Server-based rules must apply to messages when they are first delivered to your **Inbox**, and the rules must be able to run until they are completed on the server. For example, a rule that specifies that a message be printed can't run until it is completed on the server. If a rule can't be applied on the server, it is applied when you start Outlook and then becomes a client-only rule.

- **Client-only rules**   Client-only rules are rules that run only on your computer. These are rules that run in Outlook instead of on the Exchange server. Client-only rules can only run when Outlook is running.

If your list of rules contains both kinds of rules, the server-based rules are applied first, followed by the client-only rules.

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Applying rules to other Outlook items

Delivery receipts, voting responses, and Automatic Replies

When rules are applied, delivery receipts, read receipts, voting responses, and Automatic Replies (Out of Office notifications) are processed as if they are messages. For example, a rule that moves items with the word "meeting" in the subject to a specific folder, also moves all delivery receipts, voting responses, or an Automatic Reply that contains the word "meeting" in the subject.

NOTE— When a rule moves voting responses from the **Inbox** to another folder, vote tracking is affected. When a sent message that included a voting button is opened, the tracking information won't include a tally for responses that a rule moved. Manually moving or deleting a response doesn't affect the tracking.

Meeting requests, task requests, and documents

When applying rules, meeting requests, task requests, and documents are considered messages. For example, a rule that moves items with the word "meeting" in the **Subject** box to a specific folder also moves any task request or meeting request that meets that condition. However, be aware the following limitations when you create rules that affect these kinds of items:

- An item moved to a folder other than a mail folder might not work as expected after it is moved. For example, if a message is moved to the **Calendar** folder, a new appointment isn't created.

- If a meeting or task response is moved to the **Deleted Items** folder by using a rule, the response isn't tracked by the original item.

- If a meeting request is automatically moved to the **Deleted Items** folder, the meeting isn't added to the **Calendar**.

- Rules that affect messages that you send aren't applied to task requests and meeting requests.

Contact Groups

A rule that includes a Contact Group can behave differently depending on how the rule is created.

- **Move messages sent to a public group to a folder**   This rule is available only if you are using an Exchange Server account. Only messages that are sent to the Contact Group are moved to the specified folder. Messages from people who are members of the Contact Group aren't moved to the specified folder.

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Forwarding messages outside your organization

By default, Microsoft Exchange Server accounts (starting with Exchange Server 2010) can't use rules to forward messages to email addresses outside your organization. This setting helps prevent confidential and private organizational information from being disclosed. This setting can only be changed by an Exchange administrator.

For more information, see Determine the version of Microsoft Exchange Server my account connects to.

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