Rules allow you to automate email activities in Outlook. The rule in this document will help you to automatically move Identity Finder categorized emails to the DCL3 folder (PST) To establish a new rule in Microsoft Outlook, take the following steps.

1. Rules allow you to FOLDER 
 Delete
 Reply
 Reply
 Fig. Meeting
 Move to IF

 Delete
 Reply
 Reply
 Forward
 Move to IF
automatically do ٢ 2 \* 1+ III Cate One-Click Meet lule Sunk-Follow Up specific commands in Kee Delete Christ Steps Move Tags find All Unre · Favorite: your inbox. In this case, 1 DIO FROM Inbax 49 SUBJECT tudents we will create a rule Sent Items Drafts (7) that will automatically Harnad Mail Deleted Items 673 move all IF category e-Barfield 2 DCL3 Emails mails to the DCL3 Rules in Outlook allow you to automate tasks that KBarfield1@trcc.co Drafts [7] are done routinely. If you set up this rule it will Emails folder every time Deleted Items 675 automatically move any IF (Purple Category) item to the DCL3 Emails (PST) whenever Outlook is opened. YOU ARE NOT REQUIRED TO SET UP A Sent Items Inbox 49 Junk E-mail [1] Division Directo Outlook is opened. GE Assignments RULE. YOU CAN MANUALLY MOVE FILES. RSS Feeds Search Fold DCL3 Email Deleted Itoms 1 Search Folder TR-Didym 2. First, go to the Home tab on Outlook. You will Search People Move -O Unread/ Read see a *Move* group on \* :-- Rules -Categorize \* Address Book the right in the toolbar. Always Move Messages From: Dean, Sandra F In that group, click the F2 Always Move Messages To: TR-AIITRCC ~ *Rules* button and a drop Current Mailbox Create Rule... down menu will appear. From there, click Manage Rules & Alerts... OR ... SIZE 8 3 Manage Rules & Alerts. Sat 4/25/2015 2:27 PM 45 KB A., Fri 5/1/2015 8:48 AM B.. [ 7 KB 10 KB Fri 5/1/2015 9:01 AM B... Fri 5/1/2015 1:49 PM B... 16 KB



3.	A Rules and Alerts	Rules and Alerts X		
	window will pop-up.	E-mail Rules Manage Alerts		
	button.	New Rule  Change Rule * © Copy  > Delete  > Bun Rules Now  Option    Rule (applied in the order shown)  Actions    Image: TR-ServiceDesk  Image: ServiceDesk    Image: Tr-ServiceDesk  Image: Servi		re not
4.	In the Rules Wizard	nread	OK Cancel	Apply
	window. select the	in cuu	Touris Truster	
	Move messages from	Rules and A	Start from a template or from a blank rule Step 1: Select a template	×
	someone to a folder	E-mail Rule	Stay Organized	
	option then click Next	New F	Move messages from someone to a folder	
	option, then thek wext.	Rule (	Move messages with specific words in the subject to a folder Move messages sent to a public group to a folder	-
		TR-Se	Flag messages from someone for follow-up	
		The M	Move Microsoft InfoPath forms of a specific type to a folder	ŧT.
		Tech 8	Stay Up to Date	
		DEOS	Display mail from someone in the New Item Alert Window	
		✓ info@i	Send an alert to my mobile device when I get messages from someone	iY v
		Rule desc	Start from a blank rule	E
		Apply th from TR-	Image: Apply rule on messages I send	
		more a c		
			Step 2: Edit the rule description (click an underlined value)	8
			Apply this full after the message arrives from people or public group	B
		Enable	move it to the <u>specified</u> folder and stop processing more rules	
		A There show	Example: Move mail from my manager to my High Importance folder	not
				Apply
		Stroup, Marg	Cancel «Back Next > Finish	Mon 5/4/201



5. In the *Step* 1 section of Inread Rules Wizard **Surrent Mailb** × the window, you will be Rules and Which condition(s) do you want to check? able to select the Step 1: Select condition(s) E-mail Rule conditions you want. where my name is in the Cc box where my name is in the To or Cc box New F Check the Assigned to where my name is not in the To box sent to people or public group Rule ( category option and with specific words in the body TR-Se with specific words in the subject or body leave all other check 1Y The M with specific words in the message header The C boxes blank. with specific words in the recipient's address Tech I with specific words in the sender's address ✓ assigned to <u>category</u> category IT Sub ✓ DEOS assigned to any category which is an automatic reply IY ✓ info@ which has an attachment with a size in a specific range Rule descr received in a specific date span Apply th uses the form name form from TRwith selected properties of documents or forms move it t sender is in specified Address Book Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from people or public group and assigned to category category Enable move it to the specified folder A There show not and stop processing more rules Cancel < Back Next > Finish Stroup, Marg Mon 5/4/201 6. In Step 2, you will need Inread urrent Mailb Rules Wizard × to select the category × Which condition(s) do you want to check? the new rule will Step 1: Select condition(s) E-mail Rule marked as importance handle. Press the marked as sensitivity New F category link and a popflagged for action where my name is in the Cc box Rule ( ~ up will prompt you to where my name is in the To or Cc box TR-Se where my name is not in the To box select a category. Be IΥ The M sent to people or public group The C sure to select only the with specific words in the body Tech ( with specific words in the subject or body category you assigned with specific words in the message header IT Sub with specific words in the recipient's address DEOS for DCL3 e-mails. with specific words in the sender's address 🖌 info@ ĮΥ assigned to <u>category</u> category Rule desa assigned to any category which is an automatic reply Apply th which has an attachment from TRwith a size in a specific range move it t received in a specific date span Step 2: Edit the rule description (click an underlined value) Apply this fulle after on message arrives assigned to category category Tolder Enable move and stop processing more rules A There show not Next > Cancel < Back Finish Stroup, Marg Mon 5/4/201



7. Again in *Step 2*, click the *specified* link and a popup will prompt you to select the folder you would like to move the e-mails to. Be sure to select the *DCL3 Emails* folder. Once done, click *Next*.



8. The window will then ask what you want to do with the message. It should have both the stop processing more rules and move it to the specified folder options checked. Click Next.





9. The window will then Inread Rules Wizard Current Mailbo × ask if there are any Rules and Are there any exceptions? exceptions. You should Step 1: Select exception(s) (if necessary) E-mail Rule leave all of the except if from people or public group except if the subject contains specific words New F checkboxes here blank except through the specified account except if sent only to me Rule ( since you are only using A except where my name is in the To box TR-Se except if it is marked as importance the IF category to move IY The M except if it is marked as sensitivity The C DCL3 e-mails. Click except if it is flagged for action Tech I except where my name is in the Cc box Next. IT Sub except if my name is in the To or Cc box DEOS except where my name is not in the To box ✓ info@ except if sent to people or public group IY 4 except if the body contains specific words Rule desc except if the subject or body contains specific words except if the message header contains specific words Apply th except with specific words in the recipient's address from TR. except with specific words in the sender's address move it t except if assigned to category category Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives assigned to IF category and on this computer only Enable move it to the DCL3 Emails folder A There show not and stop processing more rules Next Cancel < Back Finish Stroup, Marg Mon 5/4/201 10. Finally, you will be Inread Rules Wizard × urrent Mailbo prompted to enter a Rules and Finish rule setup name for this rule. E-mail Rule Make sure to check Step 1: Specify a name for this rule New F *Turn on this rule*. If you IF Rule Rule ( ~ already have gone TR-Se The M through with Identity łY Step 2: Setup rule options The C Finder and categorized Run this rule now on messages already in 'Inbox' Tech ( DCL3 data containing e-IT Sub Turn on this rule DEOS mails, you can check Create this rule on all accounts IY ✓ info@ the Run this rule now on Rule desa messages already in Apply th Step 3: Review rule description (click an underlined value to edit) from TR-"Inbox." Now, click Apply this rule after the message arrives move it t assigned to IF category Finish and then OK. and on this computer only move it to the DCL3 Emails folder Remember this rule will and stop processing more rules only run when you Enable check your e-mail in There show not Outlook. Cancel < Back Figish Stroup, Marg Mon 5/4/2019

