# Creating Email Rules in Outlook:

A Method to Manage OnCourse Notification Emails

Email rules allow you to automatically sort certain email messages out of your inbox into a specified folder. This technique can be useful in managing your inbox size and making sure that messages can be found when you need them!

1. First, create a folder in Outlook where you want these emails to be filed.
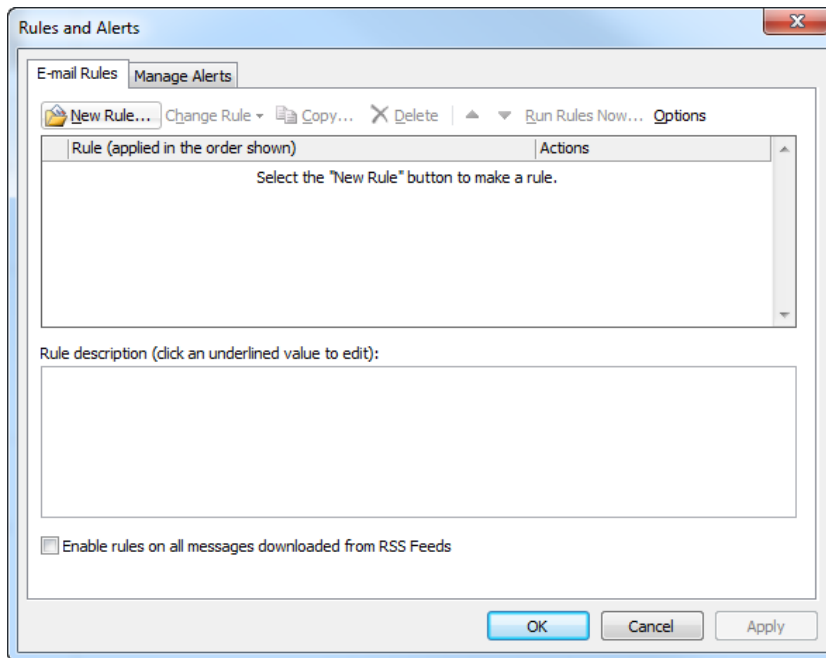   a. Right click on your Inbox folder and select "New Folder" from the menu:
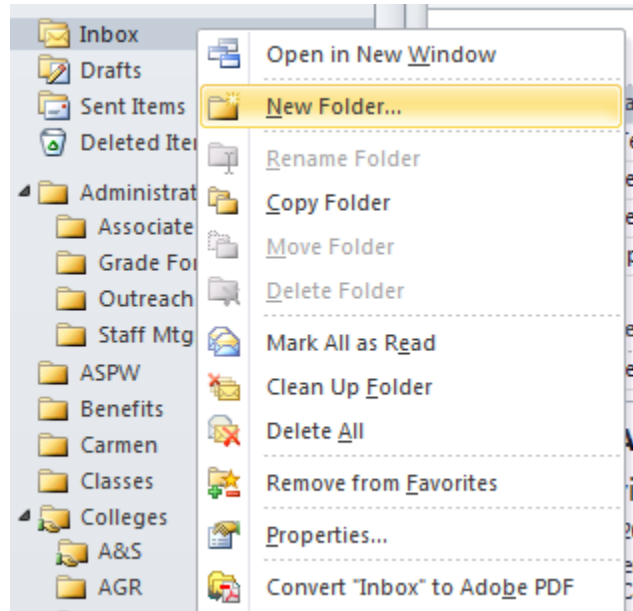
   b. Title the folder something that will make sense to you, such as **OnCourse Appointments**, and place it in your name.#@osu.edu folder.
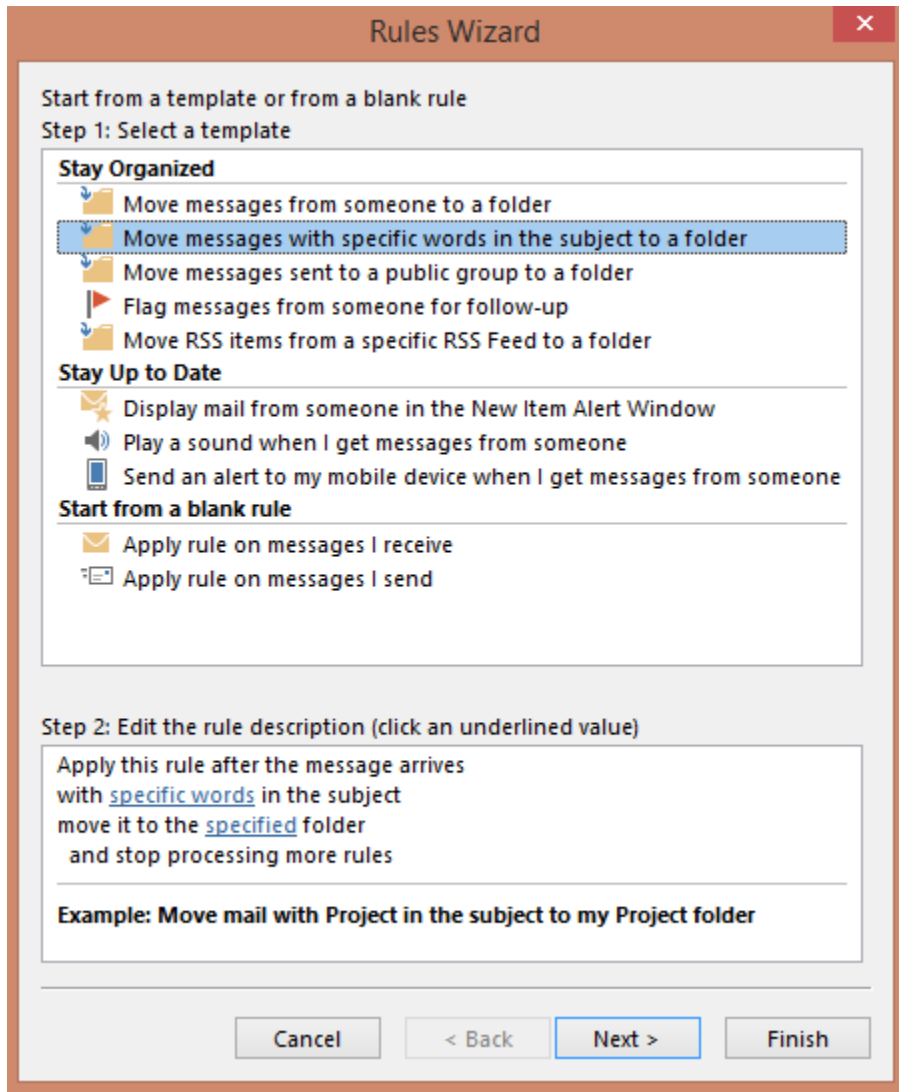
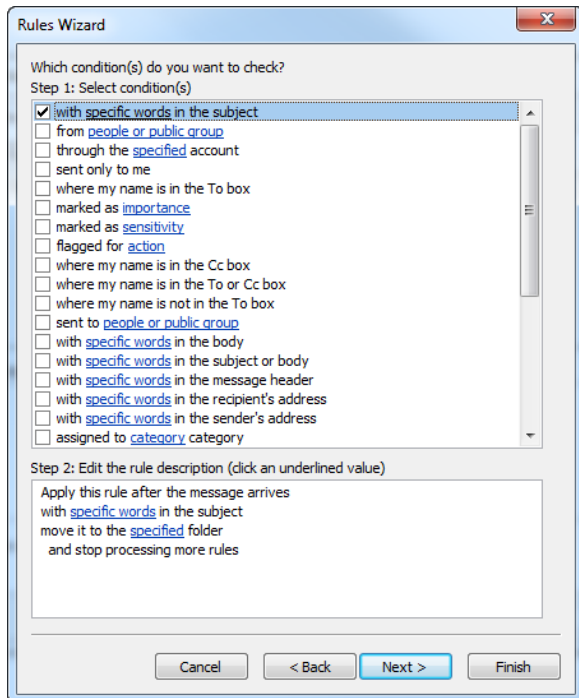2. Next, from the File menu, select "Manage Rules & Alerts"
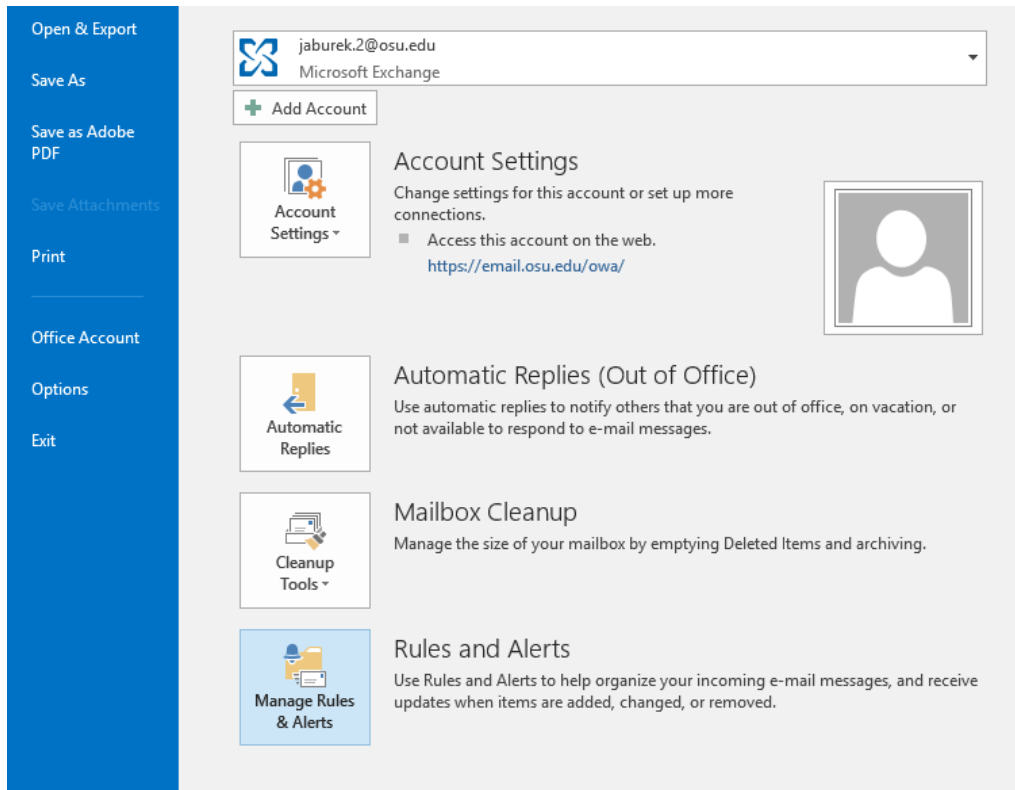
3. Select the "New Rule" button to create a new rule.

4. Select "Move message with specific words in the subject to a folder" and click Next.

5. Verify which condition(s) you want to check. "With specific words in the subject" generally is sufficient for our purposes.
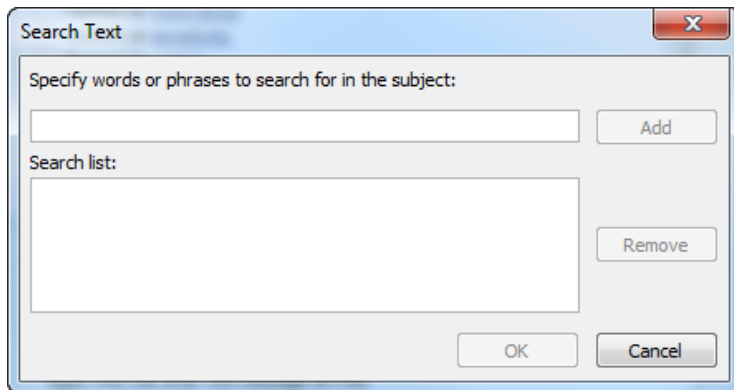
6. Click on the "specific words" hyperlink in the Step 2 area:
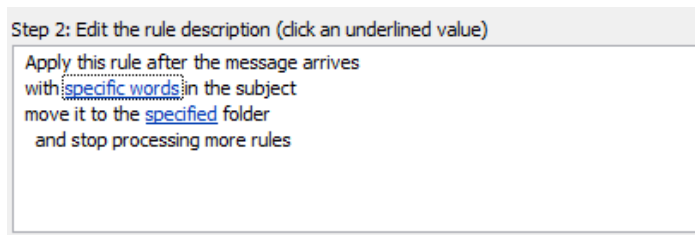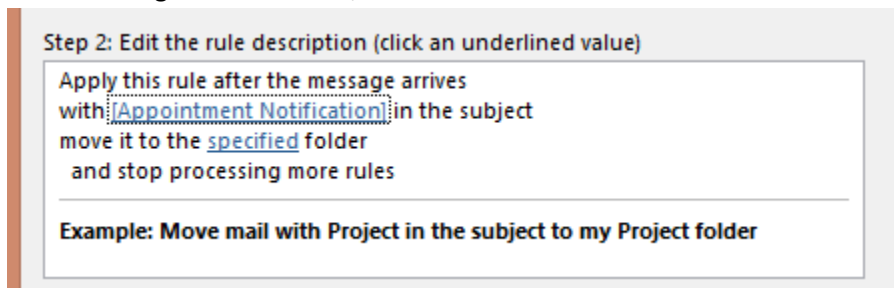
7. Type in the specific words or phrases to search for in the subject and click "Add". For the OnCourse Appointment Notifications, you will receive emails containing the following phrases in the subject line:
   a. **[Appointment Notification]**– this is the general email you will receive when an appointment is schedule
   b. **[Appointment Updated]**– this is the email you will receive if an appointment is changed

You can decide whether you want to filter all of those rules into the same folder or if you want to set up different folders for each of the messages. Once you have added the phrase(s), click "OK".

8. Now click on the "specified" hyperlink in the Step 2 area, select the folder where you want these email messages to be moved, and click "OK":

9. Click "Next".

Rules Wizard

Start from a template or from a blank rule
Step 1: Select a template

Stay Organized
  📁 Move messages from someone to a folder
  📁 Move messages with specific words in the subject to a folder
  📁 Move messages sent to a public group to a folder
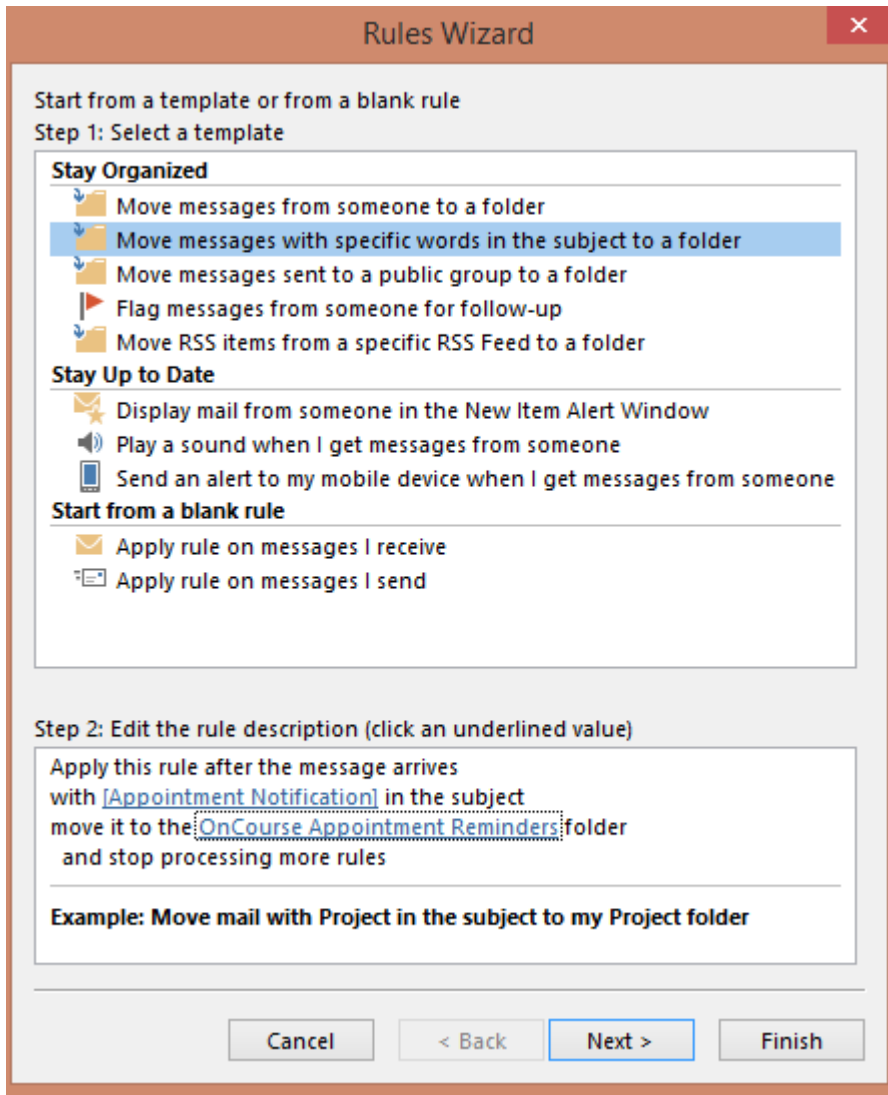 🚩 Flag messages from someone for follow-up
  📁 Move RSS items from a specific RSS Feed to a folder
Stay Up to Date
  ✉ Display mail from someone in the New Item Alert Window
  🔊 Play a sound when I get messages from someone
  📱 Send an alert to my mobile device when I get messages from someone
Start from a blank rule
  ✉ Apply rule on messages I receive
  📧 Apply rule on messages I send

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with [Appointment Notification] in the subject
move it to the OnCourse Appointment Reminders folder
 and stop processing more rules

Example: Move mail with Project in the subject to my Project folder

Cancel   < Back   Next >   Finish

10. Now you will be asked to define what you want to do with the message. "Stop processing more rules" and "move it to the specified folder" will be automatically checked. You can decide whether or not you want all messages to be marked as read when they are moved into the folder (scroll down the menu for this option). When you are finished selecting your options, click "Next".

Rules Wizard

What do you want to do with the message?
Step 1: Select action(s)

- ☑ **stop processing more rules**
- ☑ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ redirect it to people or public group
- ☐ have server reply using a specific message
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ mark it as read

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with [Appointment Notification] in the subject
move it to the OnCourse Appointment Reminders folder
 and stop processing more rules

Cancel   < Back   Next >   Finish

11. Decide if you wish to set any exceptions to the rule (you do not need to have any exceptions). Click "Next".

Rules Wizard

Are there any exceptions?
Step 1: Select exception(s) (if necessary)

- ☐ except if from people or public group
- ☐ except if the subject contains specific words
- ☐ except through the specified account
- ☐ except if sent only to me
- ☐ except where my name is in the To box
- ☐ except if it is marked as importance
- ☐ except if it is marked as sensitivity
- ☐ except if it is flagged for action
- ☐ except where my name is in the Cc box
- ☐ except if my name is in the To or Cc box
- ☐ except where my name is not in the To box
- ☐ except if sent to people or public group
- ☐ except if the body contains specific words
- ☐ except if the subject or body contains specific words
- ☐ except if the message header contains specific words
- ☐ except with specific words in the recipient's address
- ☐ except with specific words in the sender's address
- ☐ except if assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with [Appointment Notification] in the subject
move it to the OnCourse Appointment Reminders folder
  and mark it as read
  and stop processing more rules

[Cancel] [< Back] [Next >] [Finish]

12. Finish setting up your rule. Give it a name. If you are setting up a rule that might already apply to emails in your inbox, you can check the box to run the rule now on your inbox. Keep "Turn on this rule" checked. Click "Finish".

Rules Wizard ✕

Finish rule setup.

Step 1: Specify a name for this rule

[Appointment Notification]

Step 2: Setup rule options

☐ Run this rule now on messages already in "Inbox"
☑ Turn on this rule
☐ Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
with [Appointment Notification] in the subject
move it to the OnCourse Appointment Reminders folder
  and mark it as read
  and stop processing more rules

Cancel | < Back | Next > | Finish