

Outlook Rules and Alerts

Utilizing Outlook Rules and Alerts to help you organize and prioritize your e-mail.

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We do a lot of communication by e-mail. No one I know ever complains that they don't get enough e-mail and many of the people I've worked with say that they spend too much time on e-mail. However, e-mail is an integral part of the way we communicate and get things done. Today, we will look at and discuss ways to master your In-box so that your In-box doesn't master you.

Note: This presentation and presumes users' basic familiarity with the Outlook program.

Tackling your In-Box

Set aside time each day to review your e-mail. Avoid jumping on every e-mail notification you get so you can concentrate on finishing that presentation, memo, chart or spreadsheet on time. Conversely, don't let yourself be distracted when handling your e-mails.

E-mail time Management Tips (from Peter Kay of Cybercom)

- Clear your In-box out completely, once per day
- Sort in descending time order – impress person with quick reply and catch most recent of multiple e-mails
- Process, File or Delete – do NOT skip

One way to make the process of reviewing your e-mails less daunting is to set up rules and alerts so that when it's time to review your In-box things that occur on a regular basis or need to be prioritized have already been flagged and/or filed.

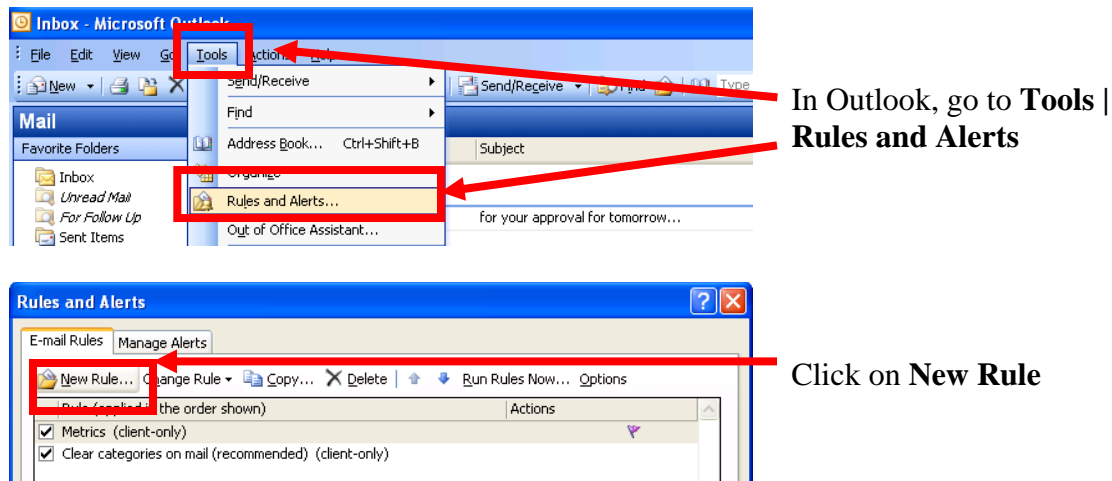
Outlook Rules and Alerts

Rules fall into two general categories: notification and organization.

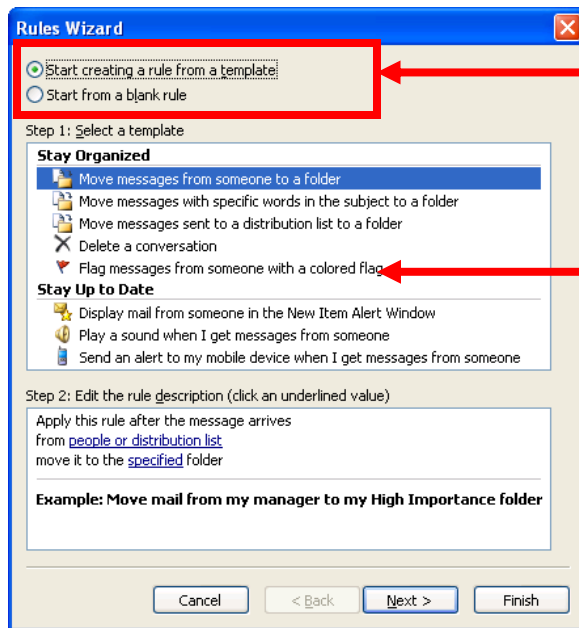
Notification rules alert you in some way when you receive a particular message. For example, you can create a rule that creates an alert when you get an e-mail from your boss with the word Urgent in it.

Organization rules perform one or more actions on a message. For example, you can create a rule that moves messages from a particular person, or with certain words in the subject, to a folder or flags them for follow-up on a particular day.

The following example sets up a rule to flag e-mails from a particular list of people.

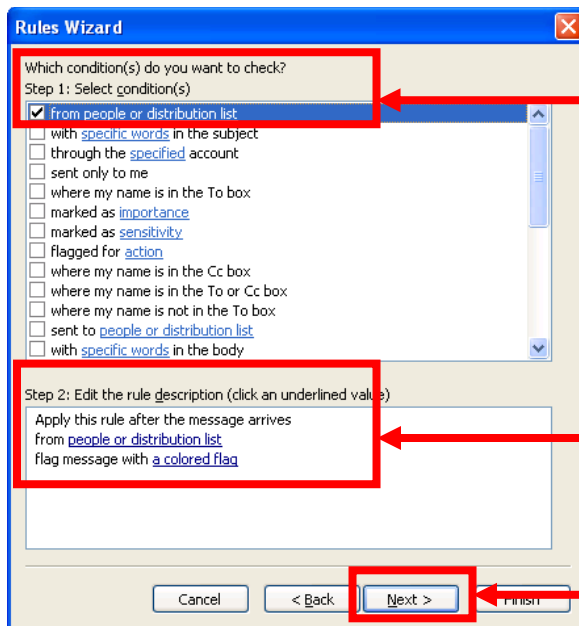


You will be defining Conditions, Actions & Exceptions



Microsoft provides rule templates or you can create them from scratch by selecting **Start from a blank rule**

If you're using a template, **Stay Organized** rules are to categorize and flag or file new messages and **Stay Up to Date** rules are to define notifications and alerts



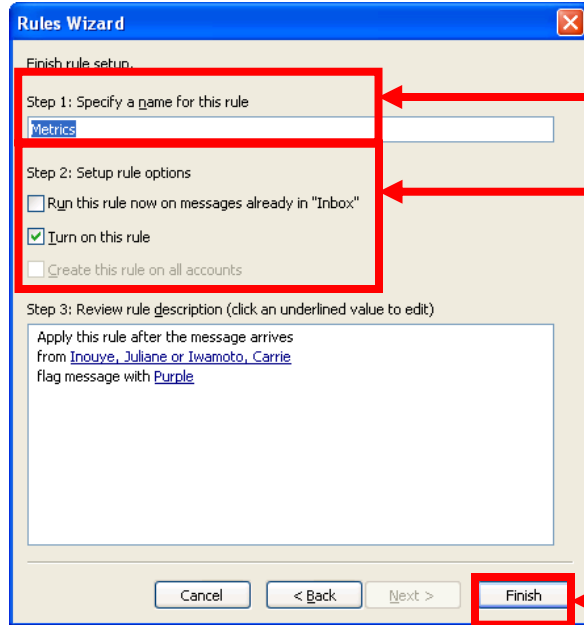
Check the condition(s) for the rules. If multiple conditions are checked, **all** of the conditions must be true for the rule to be applied.

Click on the underlined values to define rules. There are pop-up windows to help you through this.

Click on Next.

Continue through the Rules Wizard to specify Actions and Exceptions in the same way.

Remember the two step process to select and define **conditions, actions and exceptions**.

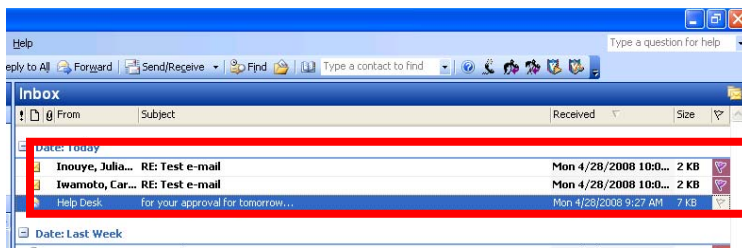


Finish rule setup: Name your rule (Step 1) and Setup rule options (Step 2).

Check **Run this rule now on messages already in “Inbox”** to have Outlook sort current messages.

HECO employees are usually provided only a single-mail account; **Create this rule on all accounts** should be greyed out.

Review the rule description (Step 3) and click **Finish**.



The result is that e-mails from designated people are automatically flagged.

Other Examples of Rules and Alerts:

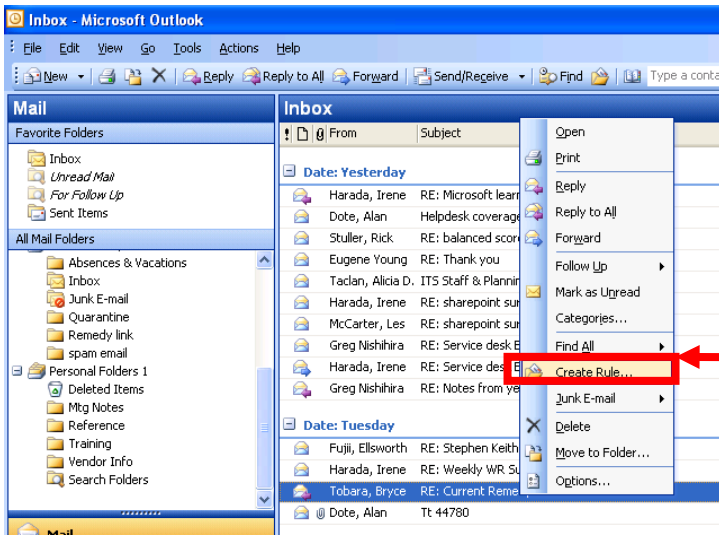
- Move project related e-mail – messages designated as from a specific sender or with specific words in the subject to a folder to review together as a group
- Move junk mail from vendors to a folder to review as time permits
- Create an alert if you receive an e-mail with URGENT in the subject line from your supervisor
- Forward or redirect messages to delegated staff or team members when you’re going to be away from the office

A complete listing of conditions, exceptions and actions is provided at the end.

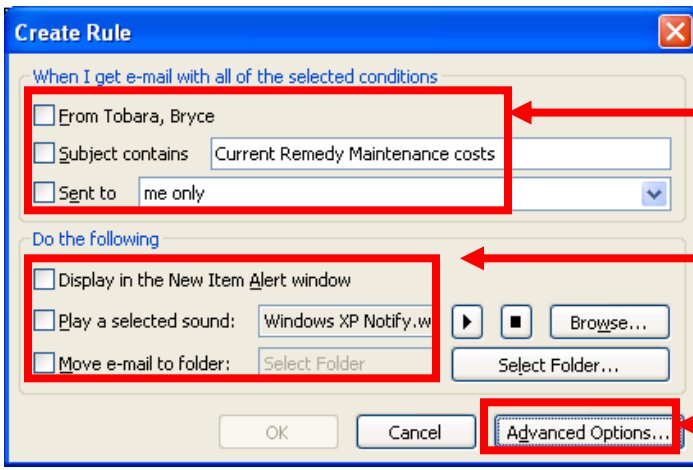
*** You should monitor your rules on a regular basis to ensure they are working as desired. Remember, things are always changing – people move or project terms change.

What rules do you use or do you think you could use to organize your In-box?

Rule Set-up Shortcut



If you have an e-mail that is an example of a rule's condition, right click on the message and click on **Create Rules** to bring up a Rule Definition short-cut window. Selected conditions are pre-defined for you based on the e-mail you click on.



Check appropriate conditions that are suggested and edit criteria.

Check the appropriate actions that are suggested. (Only 1 step actions can be added).

To view the complete set of rule set-up windows click on **Advanced Options**.

Additional Notes on Rules and Alerts

Some rules are *client only rules* which mean they run only when you are logged into your outlook account. *Server rules* do not require you to be logged in and are processed before *client only rules*. Rules are also processed based on the order you list them.

If you would like to have messages automatically forwarded to others when you're not logged in use the option to ***redirect e-mail***. You cannot combine *client only rules* and *server rules*. So if you want to re-direct e-mail while you're out of the office (a server rule) and have that same e-mail placed in a specific folder (a client only rule), you will need to create two separate rules to do this.

Be careful with the number of conditions included in your rules. Remember if multiple conditions are specified **all** of the conditions must be true in order for the rule to be applied. If multiple exceptions are specified **only one** of them must be true in order for the rule not be applied.

The following are treated as messages: delivery receipts, read receipts, voting responses, and out-of-office notices. Thus, when you create a rule that moves messages with the word "meeting" in the Subject box, all delivery receipts, voting responses, and out-of-office messages that meet this condition are moved. Also, if a voting response is moved out of the In-box, the response is not automatically tracked in the original message.

Accessing Outlook via the Internet does not always trigger client only rules.

Final Outlook Tools and Tips

Make a commitment today to manage your e-mail more effectively. You can easily move items from your inbox to your calendar or task list with the drag and drop or cut and paste features of Microsoft. Since you don't want to be distracted by e-mail pop up alerts, because you're concentrating on your task or don't want them to show up during a presentation, turn off the pop-ups that appear whenever you get new mail.

Turning off E-mail Pop-ups

1. On the **Tools** menu, click **Options**.
2. On the **Preferences** tab, click **E-mail Options**, and then click **Advanced E-mail Options**.
3. Under **When new items arrive in my In-box**, uncheck the **Display a New Mail Desktop Alert (default In-box only)** check box.
4. To resume displaying Desktop Alerts, check the **Display a New Mail Desktop Alert (default In-box only)** check box.

Resources

Take Back Your Life! Using Microsoft Outlook to Get Organized and Stay Organized, by Sally McGhee, Microsoft Press, c.2005


Peter Kay, CyberCom, HECO executive overview

Listing of Conditions, Exceptions and Actions

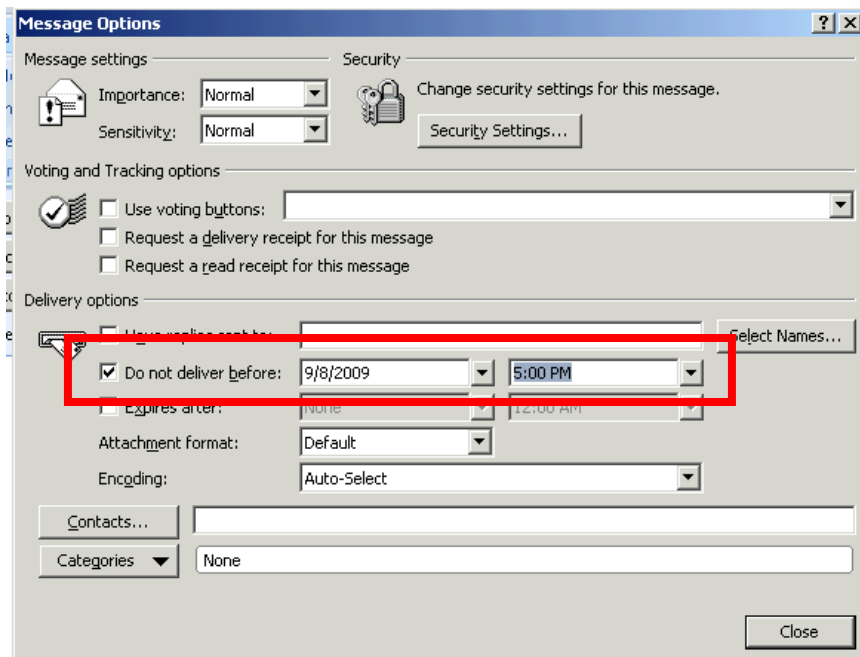
| Conditions/Exceptions | Actions |
|--|--|
| From people or distribution list | Move it to the specified folder * |
| With specific words in the subject | Assign it to the category category * |
| Through the specified account * | Delete it |
| Sent only to me | Permanently delete it * |
| Where my name is in the To box | Move a copy to the specified folder * |
| Marked as importance | Forward it to people or distribution list * |
| Marked as sensitivity | Forward it to people or distribution list as an attachment * |
| Flagged for action | Redirect it to people or distribution list |
| Where my name is in the Cc box | Have server reply using a specific message |
| Where my name is not in the To box | Reply using a specific template * |
| Sent to people or distribution list | Flag message for action in a number of days * |
| With specific words in the subject or body | Flag message with a colored flag * |
| With specific words in the message header | Clear the message flag |
| With specific words in the recipient's address | Mark it as importance * |
| With specific words in the sender's address | Print it * |
| Assigned to category category * | Play a sound * |
| Which is an Out of Office message | Start application * |
| Which has an attachment | Mark it as read |
| With a size in a specified range | Run a script * |
| Received in a specific date span | Stop processing more rules |
| Uses the form name form * | Perform a custom action |
| With selected properties of documents or forms * | Display a specific message in the New Item Alert Window * |
| Sender is in specified Address Book * | Display a Desktop Alert * |
| Which is a meeting invitation or update | |
| On this machine only * | |

* Asterisked items are client only conditions and actions

Bonus 1: Do Not Deliver Before Option

1. In the message itself, on the **Options** tab, in the **More Options** group, click **Delay Delivery** .
2. Click **Message Options**.
3. Under **Delivery options**, select the **Do not deliver before** check box, and then click the delivery date and time that you want.

After you click **Send**, the message remains in the **Outbox** folder until the delivery time.



NOTE If you are using a POP3 account, Outlook must remain open until the message is sent. To determine the type of account you are using, on the **Tools** menu, click **Account Settings**. On the **E-mail** tab, the **Type** column lists the type of accounts that are in your active Outlook profile.

Bonus 2: Color coding e-mail messages

1. On the **Tools** menu, click **Organize**.



2. In the **Ways to Organize Inbox** dialog box, click **Using Colors**.
3. After **Show messages sent only to me in**, click the color that you want in the list.
4. Click **Turn on**.
5. Close the **Ways to Organize Inbox** dialog box.

NOTES

To further customize how these messages appear, such as their font style and size, click **Using Colors**, and then click **Automatic Formatting** in the **Ways to Organize Inbox** dialog box.

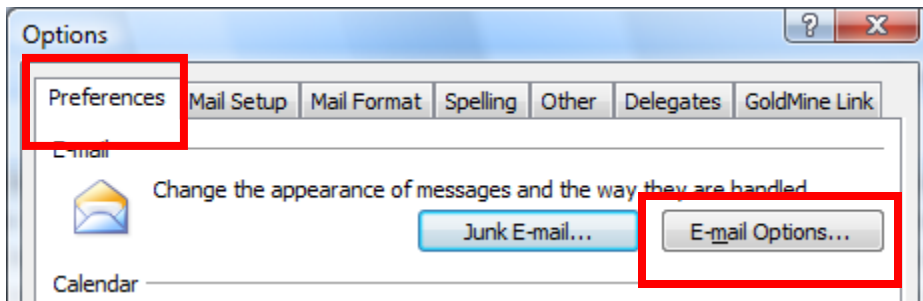
To turn off the color setting, click **Turn off**.

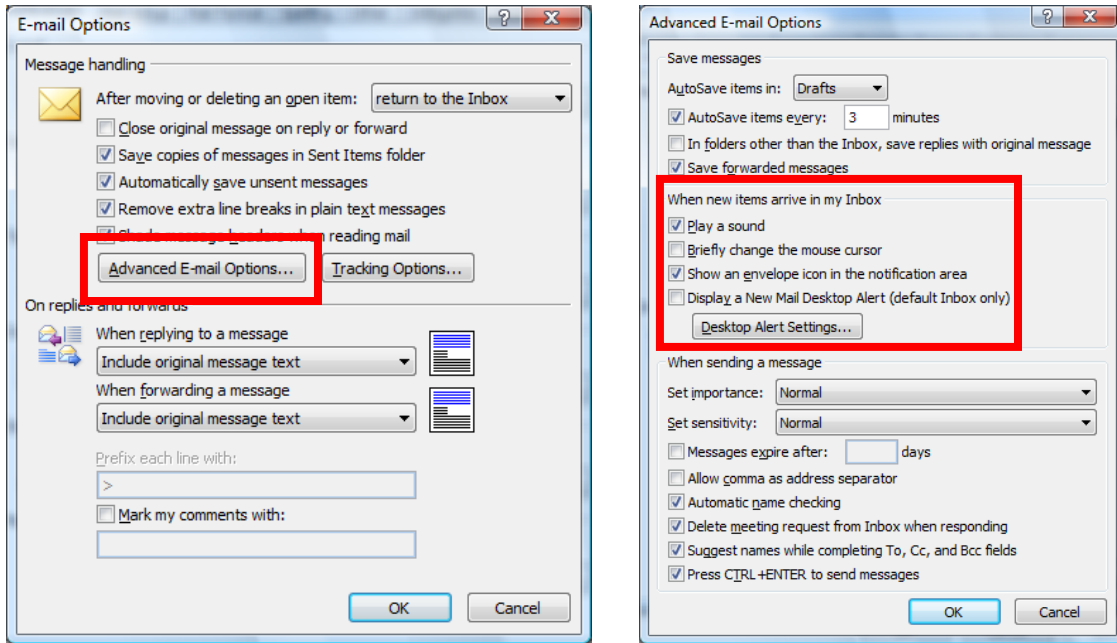
To change the color, click **Turn off**, click the color that you want in the list, and then click **Turn on**.

Bonus 3: Turning off e-mail pop-ups

Desktop Alerts are turned on by default. There might be times when you want to turn Desktop Alerts off and then on again. For example, if you are making a presentation to a public audience, you might not want Desktop Alerts to appear on your screen, revealing information that you prefer to keep private. Although Microsoft Office Outlook will not display Desktop Alerts when you are running a Microsoft Office PowerPoint presentation, the display of alerts will resume if you switch to another program or a Web site during your presentation.

1. On the **Tools** menu, click **Options**.
2. On the **Preferences** tab, click **E-mail Options**, and then click **Advanced E-mail Options**.
3. Under **When new items arrive in my Inbox**, clear the **Display a New Mail Desktop Alert (default Inbox only)** check box.





NOTE To suppress other notifications such as playing sounds, changing the mouse pointer, or displaying an envelope icon in the notification area, clear the **Play a sound**, **Briefly change the mouse cursor**, or **Show an envelope icon in the notification area** check box, respectively.