

# Setting up Rules (Filters) in Outlook 2003

*Based on documentation developed at the University of Iowa State University*

*Revised for Iowa State University Extension*

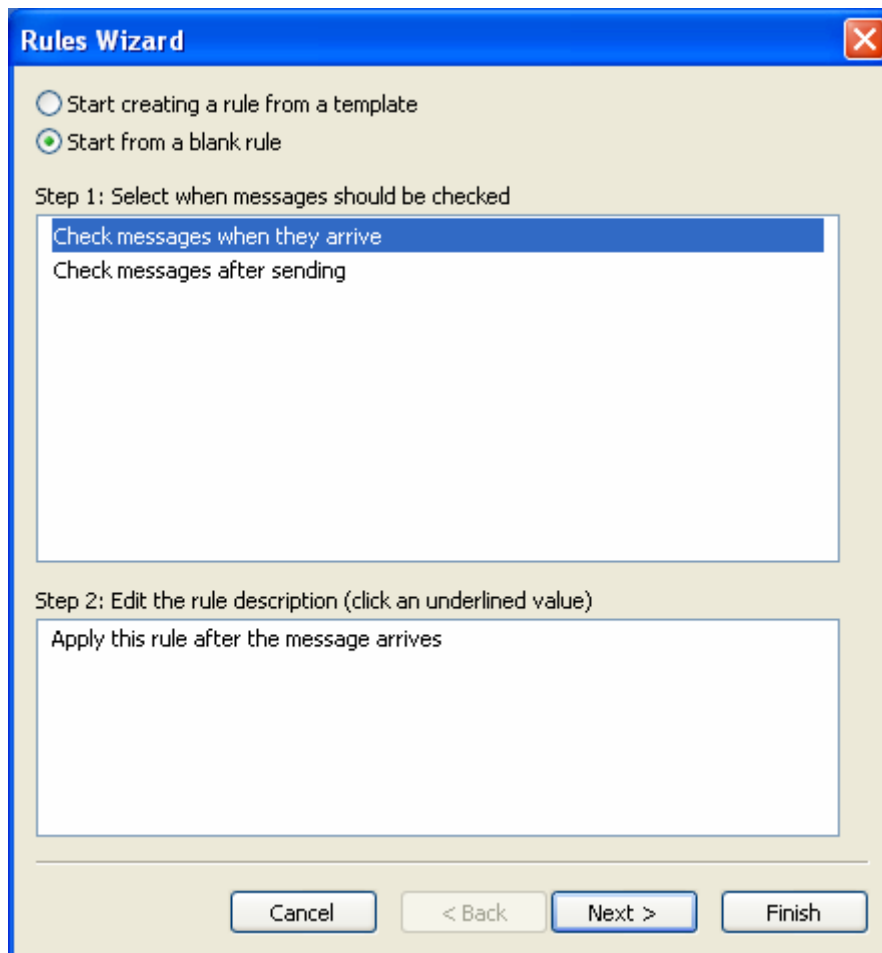
*This material can also be found in 'Life After Eudora'*

In Eudora, you could set up filters to sort mail into different mailboxes and take other actions. Outlook uses Rules to perform these tasks.

## Rules

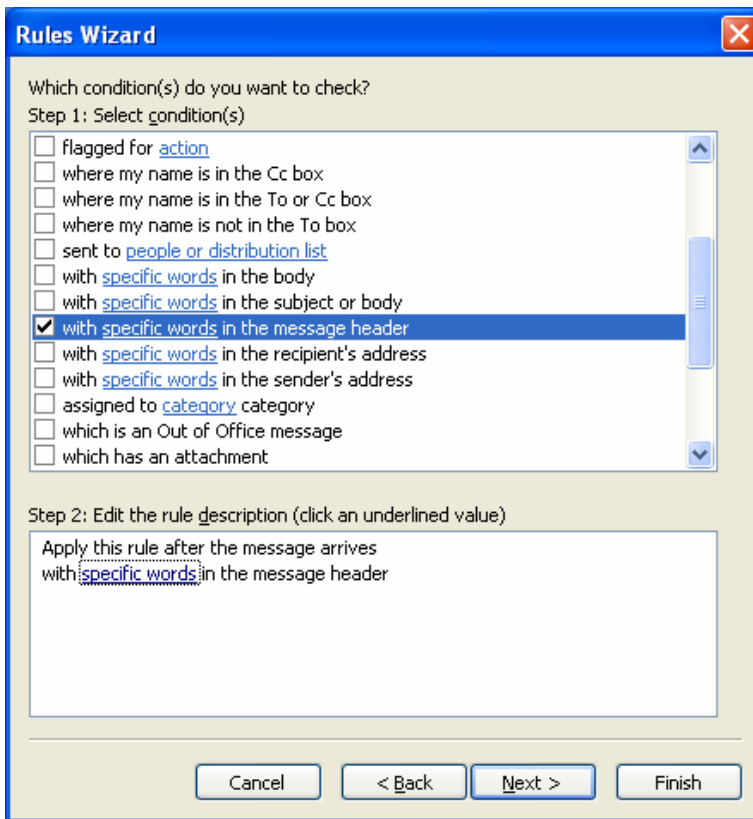
You have the ability to manage your mail by using **Rules** to automatically filter your incoming messages. After you create the **Rules**, they will be effective in both OWA (Outlook Web Access) and your Outlook 2003 client.

To display **Rules** in Outlook, when you're in Mail, select **Tools--Rules and Alerts** from the **Menu** bar. This will open a window which displays any rules or alerts you currently have created. To create a new **Rule**, click the **New Rule** button, which will launch the window below. In this example, we will create a **Rule** to send SPAM mail to the **Junk E-Mail** folder, by filtering messages with particular information in the message headers.

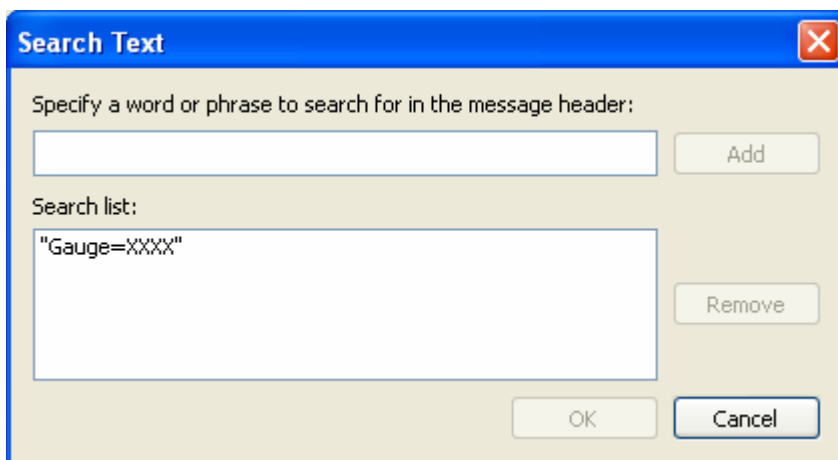


The screenshot shows the 'Rules Wizard' dialog box with a blue title bar and a close button (X) in the top right corner. It contains two radio buttons: 'Start creating a rule from a template' (unselected) and 'Start from a blank rule' (selected). Below this, 'Step 1: Select when messages should be checked' is displayed. A list box contains two options: 'Check messages when they arrive' (highlighted) and 'Check messages after sending'. 'Step 2: Edit the rule description (click an underlined value)' is shown below, with a text box containing 'Apply this rule after the message arrives'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

First, select **'Start from a blank rule.'** Click **Next.** To answer, 'Which condition(s) do you want to check? Under Step 1: Select condition(s), check **'with specific words in the message header.** Under Step 2: 'Edit the rule description', click on **'specific words'**.

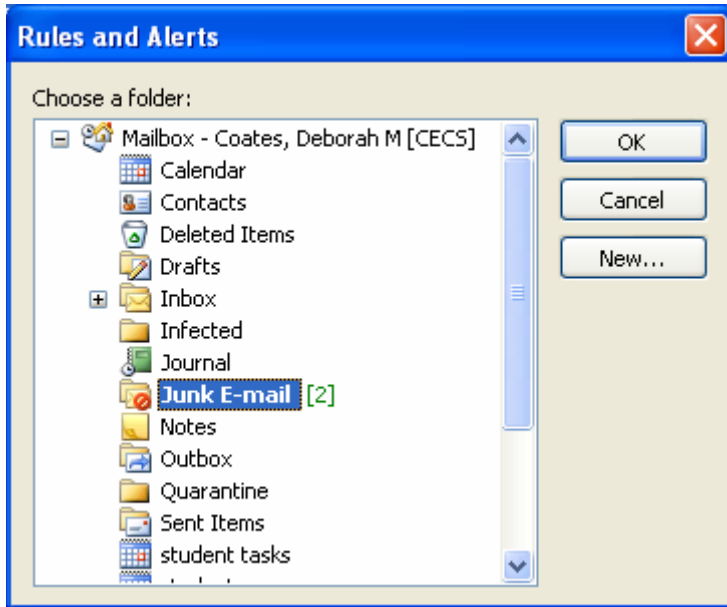


In the Search Text window, specify the words to filter on (in this case, you will enter 'Gauge=XXXX' which will transfer any message flagged as 40% probability of being spam into the **Junk E-Mail** folder. NOTE: Messages sent within iastate.edu will not be scanned for spam. Click **Add.** Click **OK.**



Click **Next.**

To answer the question, ‘What do you want me to do with the message?’ For Step 1: Select Action: click on ‘**move to the specified folder**.’ For Step 2, click on ‘**specified**’. In the Rules and Alerts window, select the **Junk E-mail** folder. Click **OK**



Click **Next**. For the question, ‘Are there any exceptions?’ select any boxes that contain exceptions you want to include with this rule. Click **Next**. Make sure ‘Turn on this rule’ is checked. Review the rule description. Click **Finish**.

### Let’s Compare:

	Eudora...	Outlook 2003...
Setting up filters (Rules):	<ul style="list-style-type: none"> <li>• Select <b>Tools--Filters</b> from the Menu bar; click the <b>New</b> button; create your filter</li> </ul>	<ul style="list-style-type: none"> <li>• Select <b>Tools--Rules and Alerts</b></li> <li>• Click the <b>New Rule</b> button</li> <li>• Set criteria in Step 1 and Step 2</li> <li>• Add additional conditions, actions and exceptions</li> <li>• Click the <b>Finish</b> button</li> <li>• Click <b>Apply</b> and <b>OK</b></li> </ul>