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Running

Microsoft®
Outlook®
2000



Microsoft Office Application

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5 Drag the desired features to the new toolbar.

6 Click Close.

The toolbar will now be listed on the Toolbars submenu or shortcut menu. To delete a custom toolbar, point to Toolbars on the View menu, choose Customize, click the toolbar in the list on the Toolbars tab, and then click Delete.

Organizing Messages

Outlook provides two ways to help you work with messages that come to your Inbox: the Rules Wizard and the Out Of Office Assistant. The Rules Wizard can be set up to automatically sort messages or to forward or reply to messages that you always treat the same way. For those times when you're out of the office, you can set up the Out Of Office Assistant to tell people who send you messages that you are away, when you'll be back, and whom to contact or what to do during your absence. The Out Of Office Assistant can also automatically sort, move, forward, and delete messages while you are away.

Managing Your Mail with the Rules Wizard

Your Inbox can easily become flooded with messages and other items. You can, of course, attend to each item manually, deleting it or moving it to another location. But sometimes there's a category of messages that you want to act on in a specific way, such as deleting all messages from a certain sender, or moving all messages about a certain subject to a new folder. You can use the Rules Wizard to automatically delete, forward, reply, move, and perform several other actions on items arriving at your Inbox.

Creating a Rule

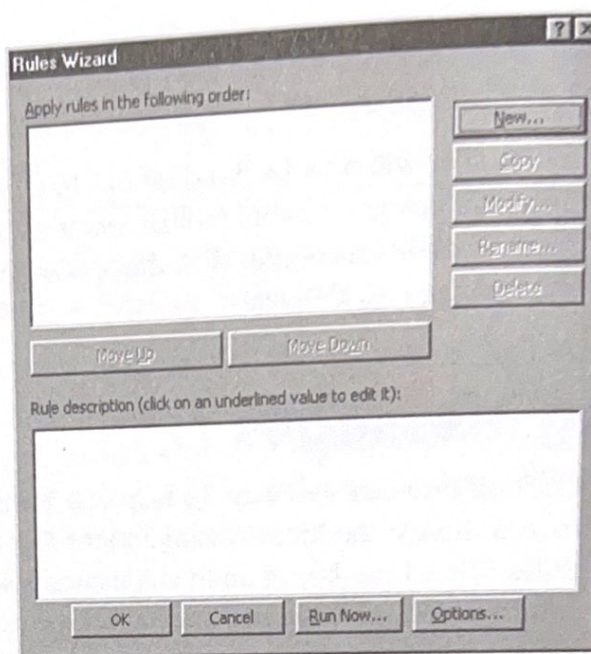
To create a rule, follow these steps:

? SEE ALSO

To quickly create a rule using the information in a specific message, see the sidebar "Creating Rules with Organize," on page 58.

- 1** Choose Rules Wizard from the Tools menu to display the dialog box shown in Figure 2-10, on the next page.
- 2** Click the New button to open the page shown in Figure 2-11, on page 53.
- 3** Select the general type of rule you want to create from the Which Type Of Rule Do You Want To Create? list. The types of rules are explained in Table 2-2, on page 54. For example, if you want to

FIGURE 2-10.
The Rules Wizard.



place an e-mail message from a particular recipient in a folder other than the Inbox, select Move New Messages From Someone.

The Rule Description box displays the logic or action of the rule. The description will change and enlarge as you select specific actions from other Rules Wizard pages.

NOTE

If you are using Outlook with Microsoft Exchange Server, you must be online to use the Rules Wizard.

In some cases, the description will contain values, which appear as underlined text. This means that you must click the underlined value to further refine the rule. If you select the Move Messages Based On Content rule, for example, you'll see the description shown here:

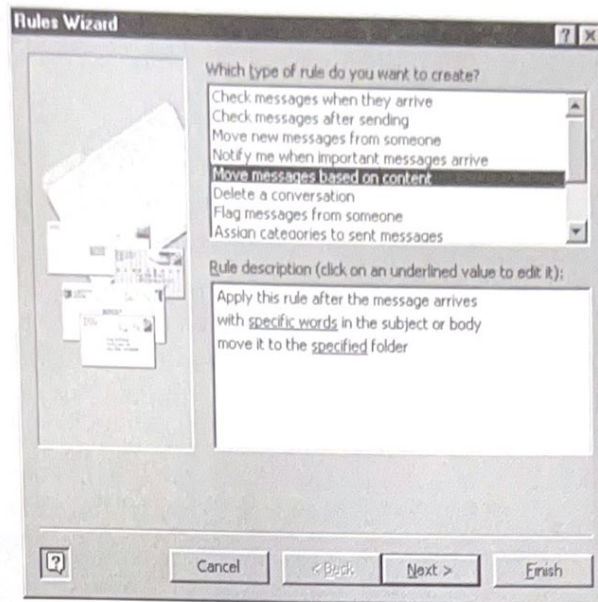
Apply this rule after the message arrives
With specific words in the subject or body
Move it to the specified folder

This means you have to click *specific words* to enter the text you want the rule to check for and then click *specified* to choose the folder in which to place the message. If you see the words People Or Distribution List underlined in the description, it means you must click it to select a specific sender or group of senders to use for the rule.

- 4 After you've chosen the type of rule, click Next.

FIGURE 2-11.

Use this page of the Rules Wizard to create a new rule.



- 5 On the Which Condition(s) Do You Want To Check? page, you select the conditions that decide whether the rule will be applied to a particular message. Most rules can be applied only when certain conditions are met, such as when a message is addressed to you or when certain words appear in the subject. The options offered by the Rules Wizard depend on the type of rule you are creating. In most cases, you can select more than one option to create rather sophisticated rules. For example, you could create a rule that checks messages to determine whether they are from the sender named Dave Olshina, have to do with budgets, and contain attachments. The list of possibilities is rather long, so a sampling is described in Table 2-3, on page 56.
- 6 After you select the conditions, click Next again.
- 7 The next page of the Rules Wizard asks What Do You Want To Do With The Message? and lets you specify the actions that will be taken for messages that meet the conditions of your rule. For example, if you want to send an automatic reply to a message, select Reply Using A Specific Template. A few of the other actions you might choose include deleting the message, forwarding it to a list of recipients, playing a sound, or moving to a folder you specify. Click Next after making your choices.
- 8 The next page of the wizard asks whether you'd like to make any exceptions to the rule you've created. For example, after specifying that all messages from a certain sender be deleted, you could

add an exception such as "except if it has an attachment." After selecting any exceptions you want to add, click Next.

- 9 You've now completed the rule, and the Rules Wizard asks you to enter a name for the rule and asks whether you want to apply the rule now to existing messages or merely add it to your list of rules to apply to new messages as they are received. If there are any underlined values (such as a specific template) shown in the description that you haven't defined yet, you will have to click them now and complete the definition.
- 10 Click Finish and the new rule appears in the list of completed rules.

TABLE 2-2. General Types of Rules to Apply

Setting	What the Rules Wizard Acts On
Check Messages When They Arrive	Performs some action when a message is received
Move New Messages From Someone	Automatically places new messages from a sender into a specified folder
Notify Me When Important Messages Arrive	Displays a specified notice when a message with a specified priority arrives
Move Messages Based On Content	Places a message containing specified text into a selected folder
Delete A Conversation	Deletes a message containing specified text in the subject
Flag Messages From Someone	Applies a selected flag for a set number of days when a message is received from a specified sender or group
Assign Categories To Sent Messages	Assigns a category to sent messages based on the recipient
Assign Categories Based On Content	Assigns a category to arriving messages based on the contents
Move Messages I Send To Someone	Moves sent messages into specific folders based on the recipient
Stop Processing All Following Rules	Stops applying any other selected rules once the conditions of this rule are met
Check Messages After Sending	Performs some action after you send a message

If you have more than one rule, the rules will be performed in the order in which they are listed in the box. To change the order of a rule, click it and then click either Move Up or Move Down depending on where you want to place the rule in the list.

You can also use the Rules Wizard dialog box to copy, modify, rename, or delete rules. For additional control over how rules are applied, click the Options button to display the dialog box shown in Figure 2-12.

The Update Exchange Server area of the Options dialog box determines when the rules you create are updated on the server. When you choose Automatically, rules that you create or change are applied immediately. Choose Manually when you want to control when new or changed rules are put into effect. The rules will be applied when you click Update Now.

NOTE

As your collection of rules grows, you'll want to give some consideration to the order in which they're applied. Placing a rule of lower priority above one of higher priority might result in your mail being processed in an unexpected and unwanted way. You might want to step through the process by thinking of a particular type of message you might receive and testing your rules order from the top to bottom to see where the imaginary message would end up. If the result is not what you intended, you might need to change the order in which your rules are applied or modify the content of one or more rules.

Use the Import And Export section of the dialog box to save your rules to a file on your disk or to retrieve a set of rules that you already saved.

Normally, the rules you create are applied only to new messages as they are received or sent. To apply the rules to existing messages, click

FIGURE 2-12.
The Rules Wizard
Options dialog box.

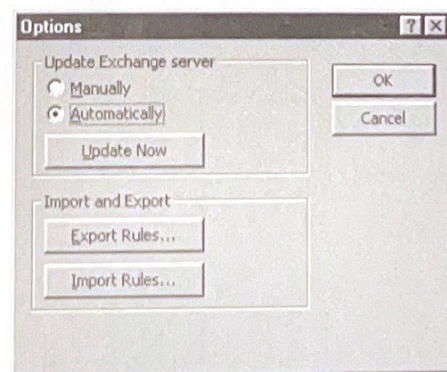


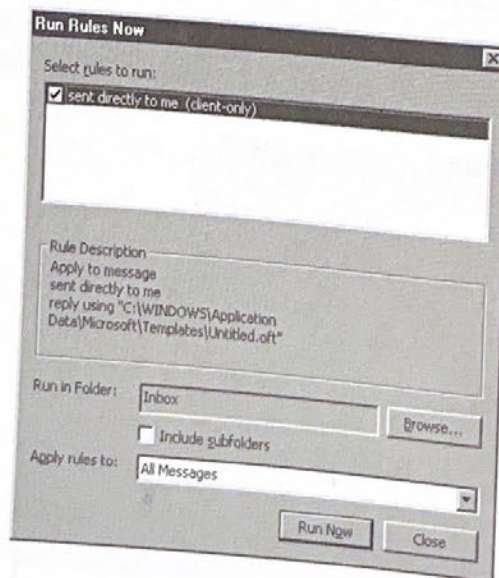
TABLE 2-3. Rules Wizard Options for Selecting Conditions

Setting	What the Rules Wizard Acts On
From <i>People Or Distribution List</i>	Items from a particular sender or group of senders
Sent To <i>People Or Distribution List</i>	Items sent to a particular recipient
Sent Only To Me	Items addressed only to you
Where My Name Is In The Cc Box	Items with your name in the Cc box
With <i>Specific Words In The Subject</i>	Items that include the specified text in the Subject box
With <i>Specific Words In The Body</i>	Items that contain the specified text somewhere in the message body
Marked As <i>Importance</i>	Items marked with a specified priority
Which Has An Attachment	Items that have attachments

Run Now in the Rules Wizard dialog box to see the options shown in Figure 2-13.

Select the check boxes for the rules you want to apply, and then choose the folder to apply the rules to. You can select only one folder at a time,

FIGURE 2-13.
The Run Rules Now
dialog box.



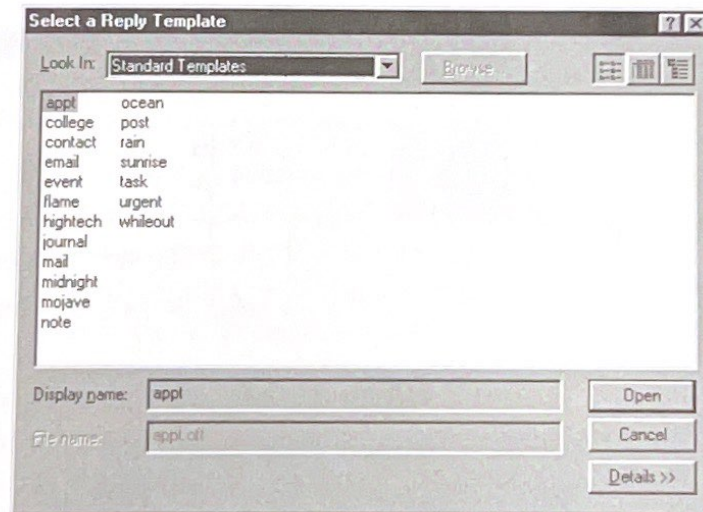
but if you select a higher level folder you can choose to apply the rules to messages in the subfolders as well. You can also choose to apply the rules to all messages, read messages only, or unread messages only in the selected folder(s). Click Run Now to apply the rules.

Rules Wizard Automatic Replies

One popular use of the Rules Wizard is to send an automatic reply to every message received. Before using this feature, you should create the message you want to use as the automated reply. This can be a simple message with some standard text reporting that you've received the sender's message and will be responding when appropriate.

To create the template, create a message, as you will learn how to do in Chapter 5, "Sending and Receiving Messages," and then open the message in either the Outbox or Sent Items folders. Choose Save As from the File menu, and type a title for the message. Open the Save As Type list, choose Outlook Templates (*.oft), and then click Save.

Now you can create the rule, and click [a specific template](#) to display this dialog box:



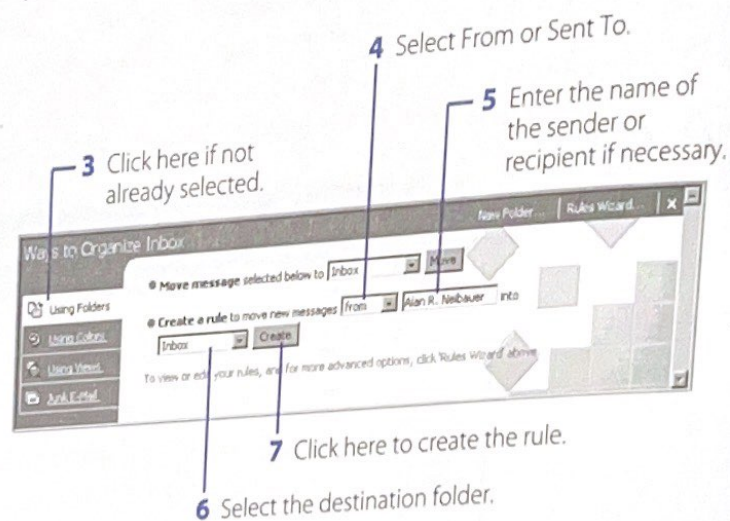
- 1 Open the Look In list and select User Templates In File System.
- 2 Select the template you want to use.
- 3 Click Open.

When you complete and select the rule, Outlook will send the automatic message in response to those meeting the rule's conditions.

Creating Rules with Organize

Outlook includes Organize, a timesaving feature that helps you manage folders and folder items. Using Organize, you can quickly create a rule without going through all of the Rules Wizard pages. You'll learn about Organize features throughout this book. Here's how to use it to create a rule:

- 1 Select the Inbox folder or another folder containing e-mail messages, such as Drafts, Sent Items, Deleted Items, or Outbox. Look for a folder containing a message to which you'd like to apply a rule. Perhaps you'll find a type of message in your Inbox that you want sent to your Deleted Items folder automatically.
- 2 Select the message and then click Organize on the toolbar to display the panel shown here:



The rule will be inserted into the Rules Wizard list and turned on. If you'd like to modify the rule you can quickly access the Rules Wizard from the Organize pane by clicking Rules Wizard.

Using the Out of Office Assistant

When you're away from your office—on vacation, for example—and you want people who write you to know that you're not available for a while, use the Out Of Office Assistant to automatically reply to each message you receive. You can also use the Out Of Office Assistant to create a set of rules for performing actions on messages. The basics of the rules are similar to using the Rules Wizard, although the pages differ.

NOTE

You can use the Out Of Office Assistant only if you are using Outlook with Microsoft Exchange Server and you have the Exchange Extensions add-in installed. For information about installing add-ins, see "Add-in Manager," on page 103.

To set up the Out Of Office Assistant, take these steps:

- 1 Choose Out Of Office Assistant from the Tools menu. You might have to expand the menu. The Out Of Office Assistant appears, as shown in Figure 2-14.
- 2 Click I Am Currently Out of The Office to turn on the Out of Office Assistant.
- 3 Type the message you want the assistant to send.
- 4 If you want the message sent to all the people who send mail to you, you can finish now by clicking OK. Each person who writes to you will receive the same message the first time they write. The mail they send will be routed according to the rules set up in the Rules Wizard. However, if you want to process the messages that arrive during your absence more individually, continue with the next step.
- 5 Click the Add Rule button, and the Edit Rule dialog box will appear, as shown in Figure 2-15, on the next page. Use this dialog box to set up rules for the types of items you want the Out Of Office Assistant to act on and the actions it should take for those items. The fewer settings you make in the When A Message Arrives section of the dialog box, the fewer steps the Out Of

FIGURE 2-14.

The Out of Office Assistant.

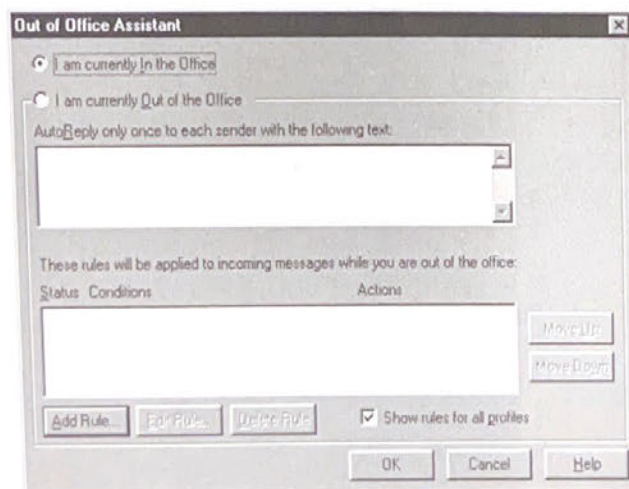
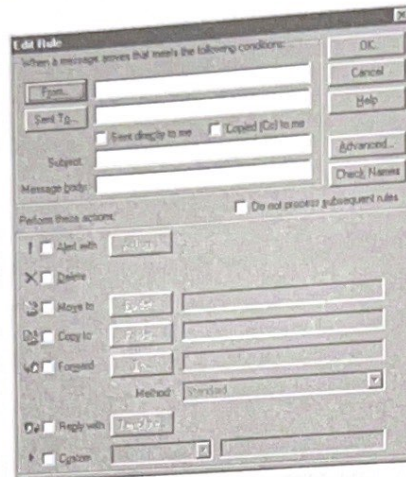


FIGURE 2-15.
The Edit Rule dialog
box.



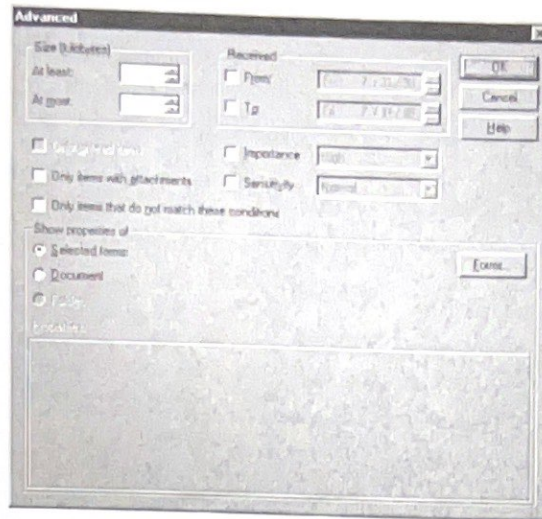
Office Assistant will need to take, and the faster your mail will be processed.

- 6 Click the Check Names button in the Edit Rule dialog box to check names you've entered in the From and Sent To boxes against the entries in your address book. Here's how it works:
 - If Outlook finds a matching name, it underlines the name and turns it into a link to the address book entry.
 - If you type a partial name, such as just a first name, Outlook will complete the name with the full listing from the address book.
 - If Outlook locates multiple matches, such as several persons with the same first name, you'll be asked to select the correct name from a list.
 - If Outlook does not find a match, it asks if you want to create a new address listing.
- 7 In the event that the Edit Rules dialog box doesn't give you enough options to process your mail in your absence, click the Advanced button to open the Advanced dialog box, shown in Figure 2-16. Consult Table 2-4, on page 62, for a description of these advanced items. When you have set up the Advanced dialog box, click OK to close it and return to the Edit Rule dialog box.

TIP

You can choose settings in the Advanced dialog box even without making any settings in the Edit Rule dialog box.

FIGURE 2-16.
The Advanced dialog
box.



- 8 After you return to the Edit Rule dialog box, having selected the kinds of items you want the Out Of Office Assistant to act on, you need to specify the actions you want the Out Of Office Assistant to take for these items. In the lower portion of the Edit Rule dialog box, choose the actions that should be taken for this set of items.
- 9 When the settings are complete, click OK in the Edit Rule dialog box to accept all the settings and return to the Out Of Office Assistant dialog box. If you want to specify different actions for other types of items, you can click Add Rule, identify a new set of messages, and select the appropriate actions. Repeat this procedure for each type of message that you want the Out Of Office Assistant to take care of—closing the Edit Rule dialog box and returning to the Out Of Office Assistant dialog box each time.
- 10 Finally, when you've finished setting up the rules you want, click OK in the Out Of Office Assistant dialog box.

When the Out Of Office Assistant is turned on, the next time you start Outlook (if you connect to your e-mail server), you'll see a message telling you that the Out Of Office Assistant is on and asking whether you want to turn it off. Click Yes to turn off the Out Of Office Assistant; click No to leave it turned on.

The rules stay intact so that you can use them the next time you're out of the office without having to set them up again. Out Of Office Assistant rules are inactive as long as the assistant is turned off.

TABLE 2-4. Advanced Dialog Box Options for Out of Office Assistant

Setting	What the Out Of Office Assistant Does
Size At Least	Acts on items that are larger than the size you set
Size At Most	Acts on items that are smaller than the size you set
Received From	Acts on items received after the date you set (for items between two dates, also set a Received To date)
Received To	Acts on items received before the date you set (for items between two dates, also set a Received From date)
Only Unread Items	Acts on items you haven't read yet
Only Items With Attachments	Acts on items that contain attachments (files or messages)
Importance	Acts on items set to the level of importance you specify—High, Normal, or Low
Sensitivity	Acts on items set to the level of sensitivity you specify—Normal, Personal, Private, or Confidential
Only Items That Do Not Match These Conditions	Uses the reverse of all your settings in both the Edit Rule and Advanced dialog boxes
Show Properties Of Selected Forms	Displays fields in the forms you select with the Forms button
Show Properties Of Document	Displays document properties
Show Properties Of Folder	Displays folder properties.

Out of Office Automatic Replies

In addition to, or instead of, sending the generic reply you enter in the AutoReply text box of the Out Of Office Assistant dialog box to everyone who contacts you while you're away, you can choose to send one or more automatic replies tailored for each type of message you've

created rules for in the Out Of Office Assistant. To send custom messages, follow these steps:

- 1 Open the Out Of Office Assistant dialog box.
- 2 Select a rule from the lower text box and click the Edit Rule button.
- 3 In the Perform These Actions area of the Edit Rule dialog box, select the Reply With check box, and then click the Template button to display the window shown in Figure 2-17.
- 4 Click To or type additional names in the text box if you want to send this reply to other people in addition to the sender.
- 5 Type an appropriate reply message.
- 6 Close the Template window.
- 7 Click Yes in the message box to save your changes.

TIP**Using the Assistant**

You can set up the Out Of Office Assistant in advance and then turn it on and off as needed. You can leave rules you create intact so that you have to set them up only once. You can, of course, change the rules at any time to better suit your needs.

When you are out of the office and a message arrives, Outlook uses the template for the reply. It inserts the word "Re:" and the original subject line as the reply's subject and sends the message.

FIGURE 2-17.

Use this window to create a template for automatic replies.

