

Outlook Client 2016 Create Rules

VANDERBILT  UNIVERSITY
MEDICAL CENTER

Information Technology

1. Click create **Rules**
2. Click **Advance Options**

Create Rule ✕

When I get e-mail with all of the selected conditions

From McCall, Megan

Subject contains

Sent to ▼

Do the following

Display in the New Item Alert window

Play a selected sound: ▶ ■

Move the item to folder:

3. Click uses the form name form

Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

- with specific words in the body
- with specific words in the message header
- with specific words in the recipient's address
- with specific words in the sender's address
- assigned to category category
- assigned to any category
- which is an automatic reply
- which has an attachment
- with a size in a specific range
- received in a specific date span
- uses the form name form
- with selected properties of documents or forms
- sender is in specified Address Book
- which is a meeting invitation or update
- from RSS Feeds with specified text in the title
- from any RSS Feed
- of the specific form type
- on this computer only

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

Apply this rule after the message arrives
uses the form name form

Cancel < Back Next > Finish

4. From the dropdown field change or select **personal forms to application forms**

Choose Forms

Organization Forms

EAS Archived Message
Email
Email - Recorded
Message - CMS Logged
Message (No EAS Archive)
Message (To Be EAS Archived)
Post

Add ->

<- Remove

Selected Forms:

Show categories

Description

 This form is used to view/retrieve messages archived by EAS.

Form Number: Version: 2 Contact: EDUCOM Training

Close

5. Click **Appointment** and **Add**

Choose Forms ×

Application Forms ▼ Selected Forms:

Accept Meeting Response
Appointment
Automatic Replies template
Conflict Message
Conflict resolution form
Contact
Decline Meeting Response
Digitally Signed Message
Distribution List

Add ->
<- Remove

Show categories

Description

 This form is used to create accept meeting responses.

Form Number: Version: Contact: Microsoft

Close

6. Click Meeting Cancellation and Add

Choose Forms ✕

Application Forms ▼ Selected Forms:

Document ▼ Add ->

Encrypted Message

Exception

InfoPath form

Journal Entry

Meeting Cancellation

Meeting Request

Message

Message Recall Report

<- Remove

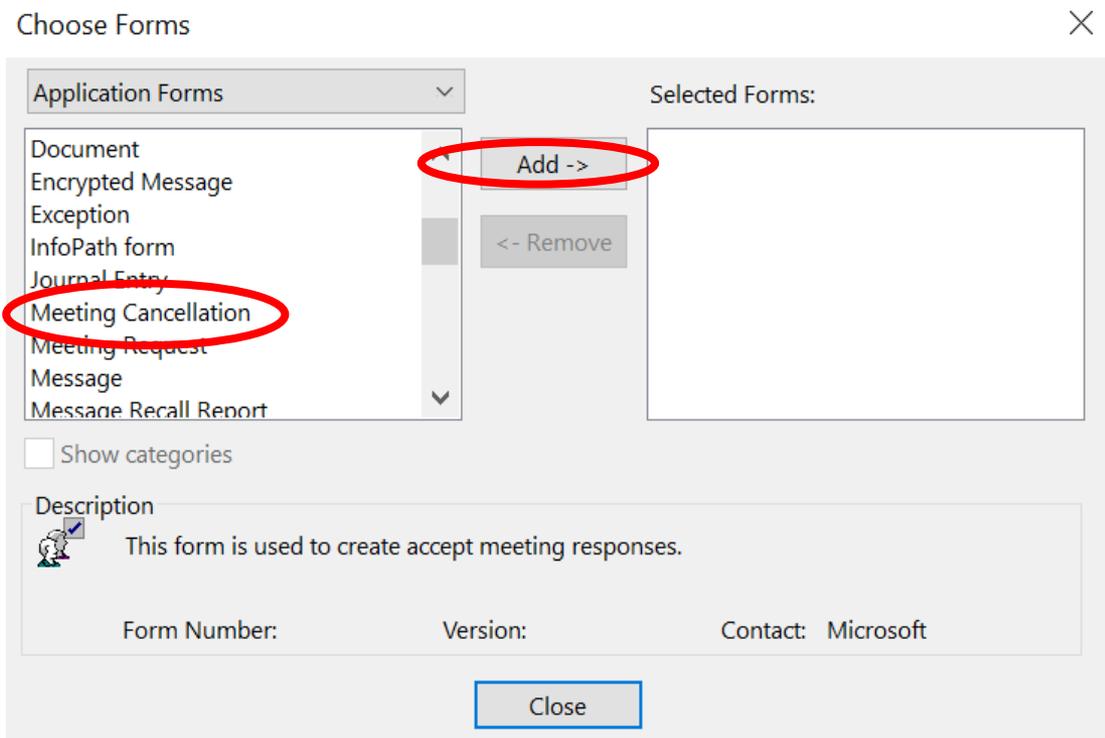
Show categories

Description

 This form is used to create accept meeting responses.

Form Number: Version: Contact: Microsoft

Close



7. Click **Meeting Request** and **Add**

Choose Forms ✕

Application Forms ▼

Selected Forms:

Document ▶ Add ->

Encrypted Message

Exception

InfoPath form

Journal Entry

Meeting Cancellation

Meeting Request

Message

Message Recall Report

Show categories

🔍 Description

This form is used to create accept meeting responses.

Form Number: Version: Contact: Microsoft

Close

8. Click Close and Next

Rules Wizard ✕

Which condition(s) do you want to check?

Step 1: Select condition(s)

- with [specific words](#) in the body
- with [specific words](#) in the message header
- with [specific words](#) in the recipient's address
- with [specific words](#) in the sender's address
- assigned to [category](#) category
- assigned to any category
- which is an automatic reply
- which has an attachment
- with a size [in a specific range](#)
- received [in a specific date span](#)
- uses the [form name](#) form
- with [selected properties](#) of documents or forms
- sender is in [specified](#) Address Book
- which is a meeting invitation or update
- from RSS Feeds with [specified text](#) in the title
- from any RSS Feed
- of the [specific](#) form type
- on this computer only

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

Apply this rule after the message arrives
uses the form name form

Cancel < Back Next > Finish

8. Click **Next**
9. Select **Forward to People** or **Public Group**
10. Click **Forward to People** or **Public Group** (bottom box)
11. Select **Primary Calendar Account**
12. Click **Ok** and **Finish**