

Section 7



Topics Covered

- Using the Rules Wizard 7-2
- Archiving old items manually 7-10
- Using AutoArchive 7-11
- Retrieving archived items 7-15



Time Required: 30 Mins



Using the Rules Wizard

Earlier in the course you learned about the Inbox where all incoming messages are stored by default. It might be the case, however, that you regularly move messages to other folders based on certain conditions, e.g. you may have a folder called **Budget Committee** where you file all mail relating to this group. In this instance, you can use the *Rules Wizard* to create an automatic procedure to file this mail for you, based on the message subject. You can also use this assistant to reply to or forward mail given conditions that you set.

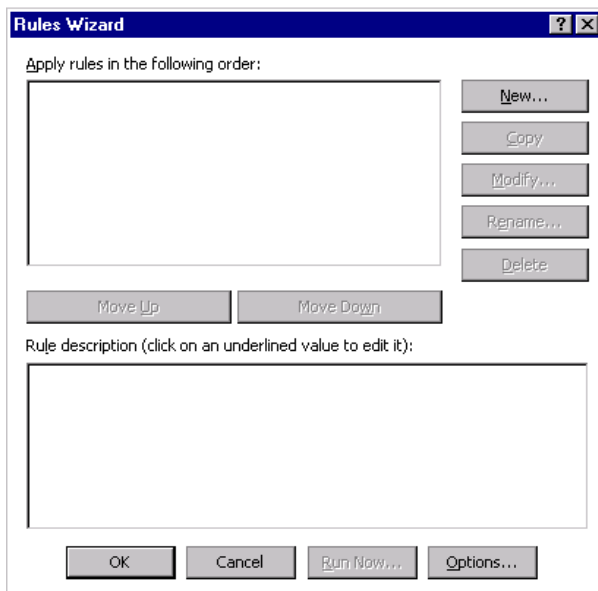
There are two steps to using the Rules Wizard: first, you set the conditions that the assistant is to test for; then you set the actions that are to be carried out whenever the conditions are met by an incoming mail message. Outlook calls these conditions rules.

Note: Some of the options in the Rules Wizard will display fewer subsequent dialogue boxes than others. This is because the option itself gives Outlook some of the information it needs, reducing the need for you to do so.

The example in this instruction set will show how to check messages as they arrive to see if the subject contains the words **budget committee**. If they do, these messages are to be moved to the **Budget Committee** folder and a message announcing their arrival displayed.

To Use the Rules Wizard

1. Select the **Tools, Rules Wizard** command.



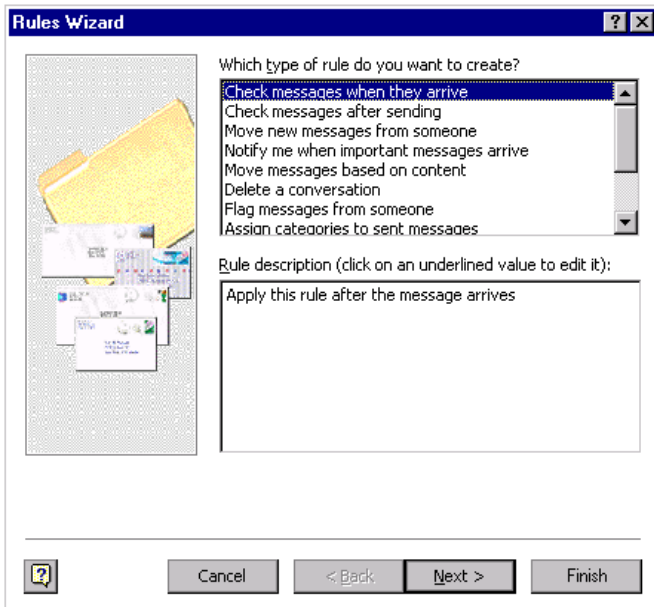
2. To add a new rule, click the **New** button. /..



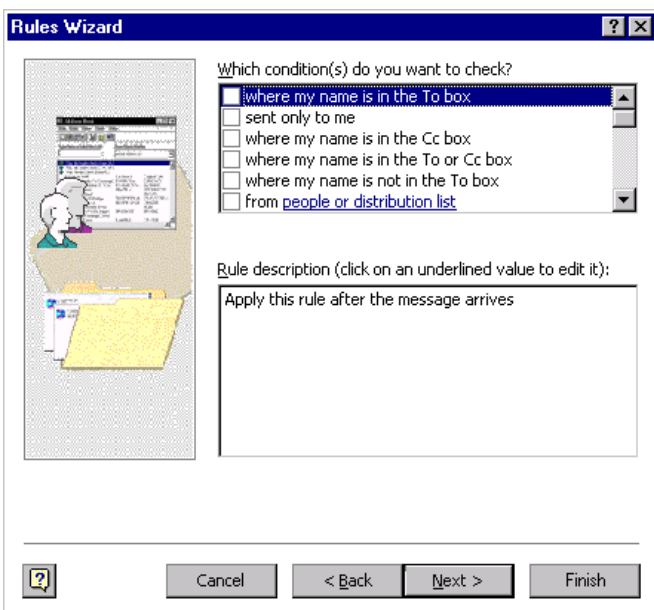
Using the Rules Wizard

../ To Use the Rules Wizard

The first of the **Rules Wizard** dialogue boxes will be displayed.



3. From the list box at the top of the dialogue box, choose the type of rule you want to create.
4. Click **Next**. /..





Using the Rules Wizard

../ To Use the Rules Wizard

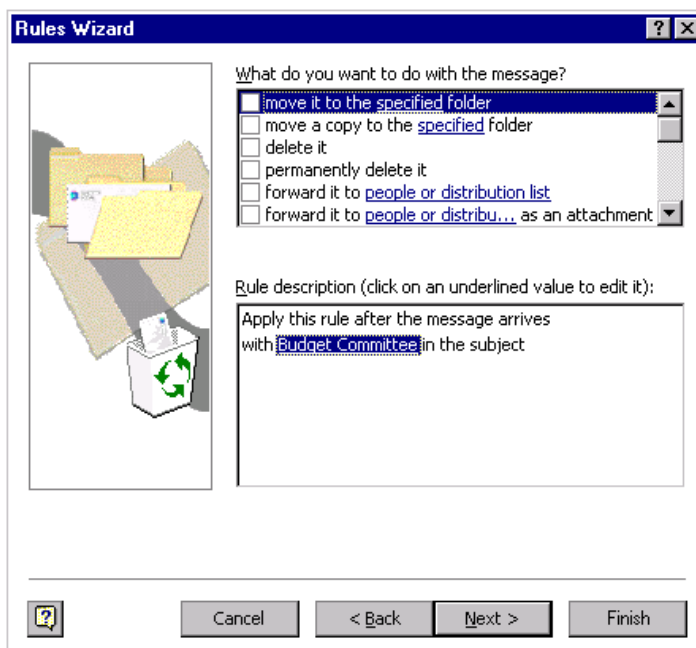
5. Choose the condition(s) that are to be applied to your incoming mail messages.

If necessary, supply the additional information required by each condition. For example, if you choose the condition

from people or distribution list

you need to specify which people or distribution list you mean. You can do this by clicking on the underlined text to display your Address Books and then choosing the appropriate entries.

6. Click **Next**.



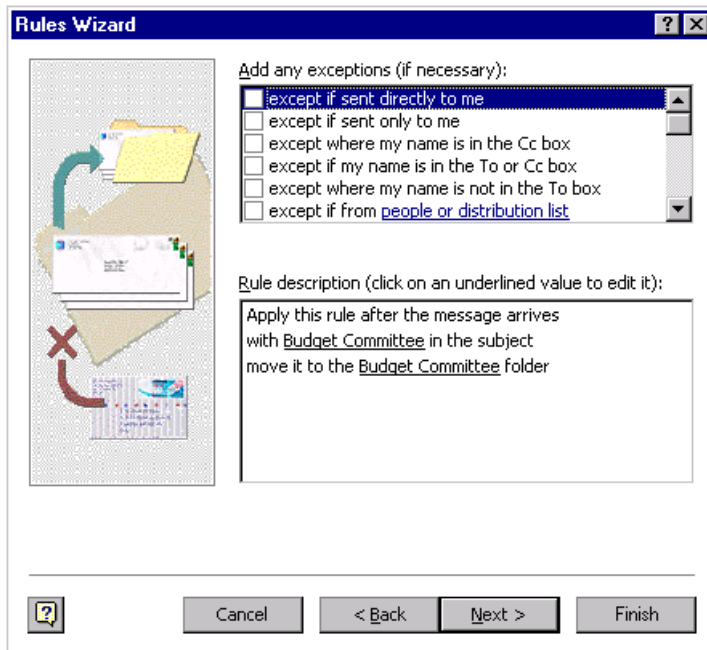
7. Choose what you want to do as a result of receiving the message, supplying additional information as required. /..



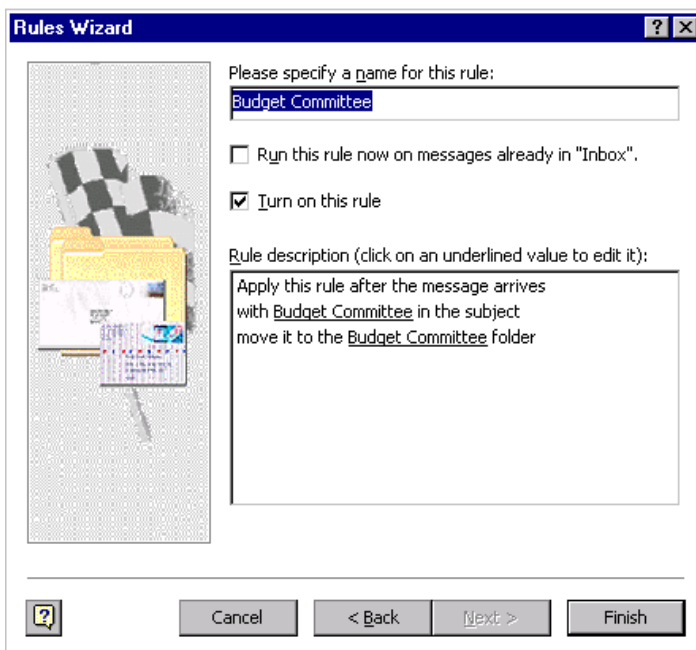
Using the Rules Wizard

../ To Use the Rules Wizard

8. Click Next.



9. If there any exceptions to this rule, specify them here then click Next. /..



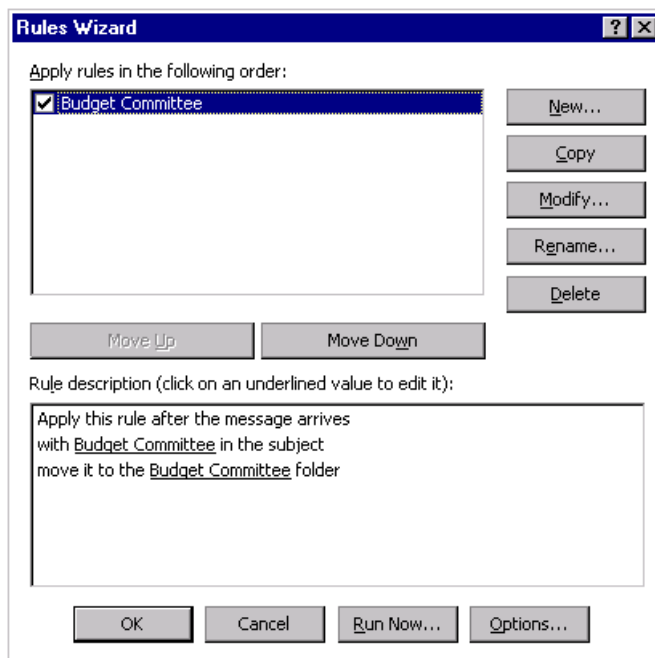


Using the Rules Wizard

../ To Use the Rules Wizard

10. Outlook will suggest a name for your rule. If you want to change this name, simply edit the entry.
11. If you want to apply the rule to messages already in your **Inbox** folder, ensure that check box is activated.
12. Click **Finish** to return to the **Rules Wizard** dialogue box.

Your rule is shown here and when it is selected you can see its description at the bottom of the dialogue box.



13. Click **OK** to close the dialogue box.

Note: This dialogue box can also be used to copy, rename, modify and delete existing rules.

To Suspend A Rule Temporarily

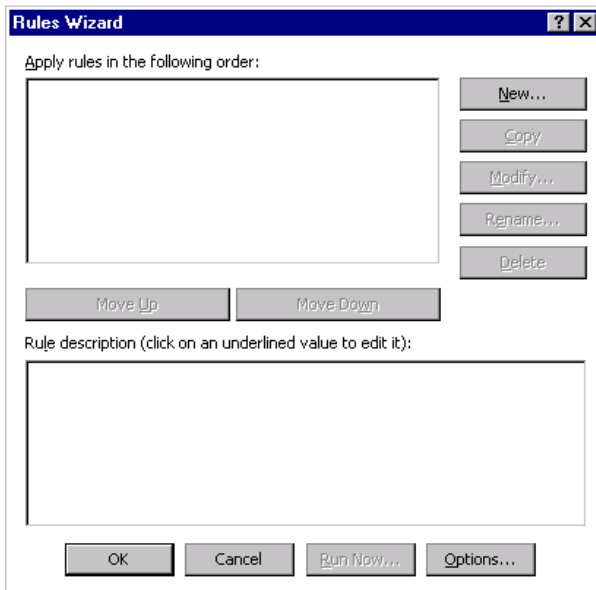
Although your rules will be needed most of the time, there may be occasions when you want to switch off a rule. For example, if you generally forward messages to an assistant and the assistant is on holiday, you may want to suspend that rule for a time. In the **Rules Wizard** dialogue box, click the check box next to the rule that's to be suspended. The rule will then still exist but won't be processed until the check box is re-activated.



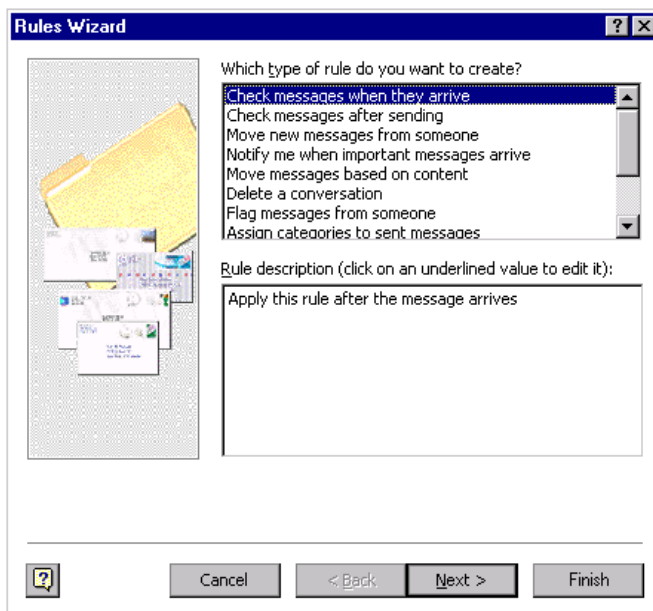
Exercise 7-1

In this exercise you'll create some rules to handle your incoming mail.

1. Display the Folder List then create a folder called **Budget Committee** in the **Inbox** folder.
2. Follow the instructions below to move incoming mail with a subject including the phrase **Budget Committee** to another folder.
 - Select the **Tools, Rules Wizard** command.



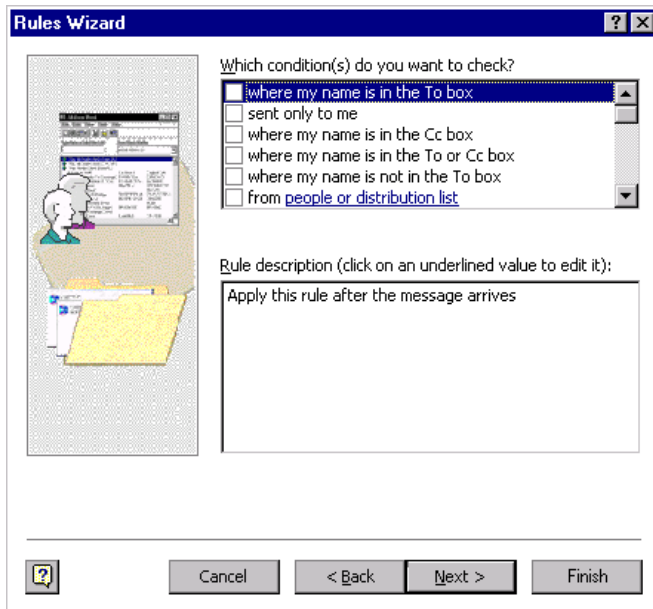
- Click **New**.





Exercise 7-1

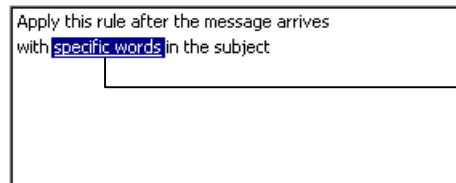
- Choose **Check messages when they arrive** then click **Next**.



- Use the scroll bar to see the **with specific words in the subject** then click the check box next to it.

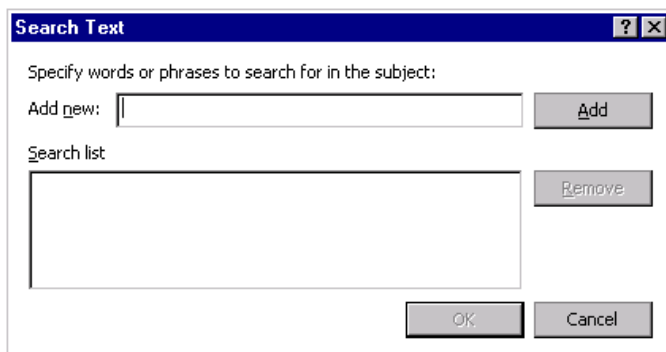
This phrase is added to the box at the bottom of the dialogue box.

Rule description (click on an underlined value to edit it):



Click here to supply the 'specific words'

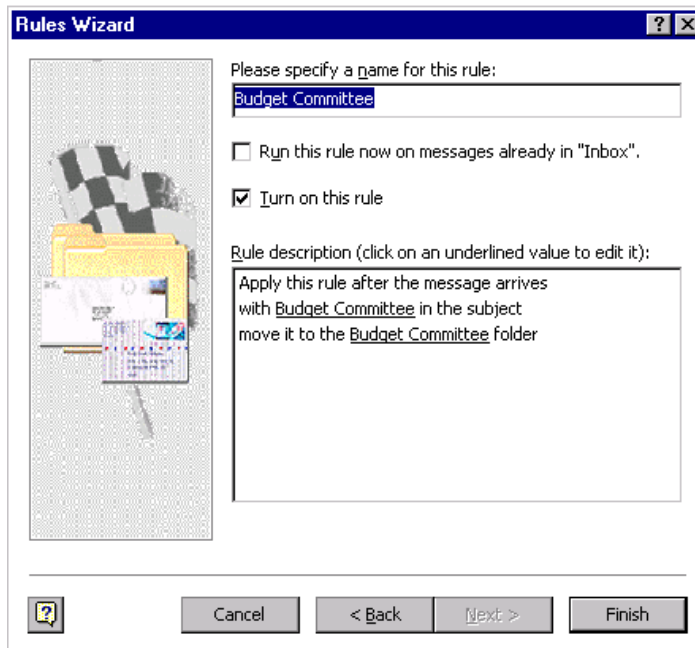
- Click the underlined wording to display this dialogue box:





Exercise 7-1

- Type **Budget Committee**, click **Add** and then click **OK**.
- Click **Next** to display the next Wizard dialogue box.
- Select the **move it to the specified folder** option then choose the **Budget Committee** folder you created earlier.
- Click **Next** to move on and **Next** again as there are to be no exceptions to this rule.



- Click **Finish**.
3. Create a rule that displays the message **You have a phone message** when a message with **phone message** in the subject is received.
 4. Create and send mail messages to prove both of these rules work.



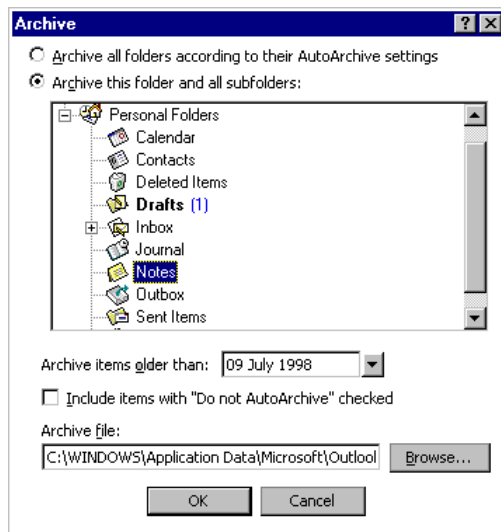
Archiving Old Items Manually

As time goes on, you'll find that your mailbox file size increases as you add items to the various folders in Outlook. To keep the file size from becoming unmanageable, either you must delete older items, or you can *archive* them. If you archive the items, they will be copied to a storage file from which you can retrieve them if you need to.

To Archive Old Items Manually

1. Select the **File, Archive** menu option.

The **Archive** dialogue box will be displayed.



2. Ensure that the **Archive this folder and all subfolders** radio button is selected then choose the topmost folder that's to be archived.
3. Choose the date before which all items in the selected folder(s) are to be archived from the **Archive items older than** drop-down list.
4. If you want to archive to a file other than the default (*archive.pst* in your **My Documents** folder), type its name and path in the **Archive file** text box or use the **Browse** button to display and select it.
5. Click **OK**.

The selected items will be copied to the specified file then removed from their original folders. Depending on how many items are stored in this folder, this may take a moment or two.

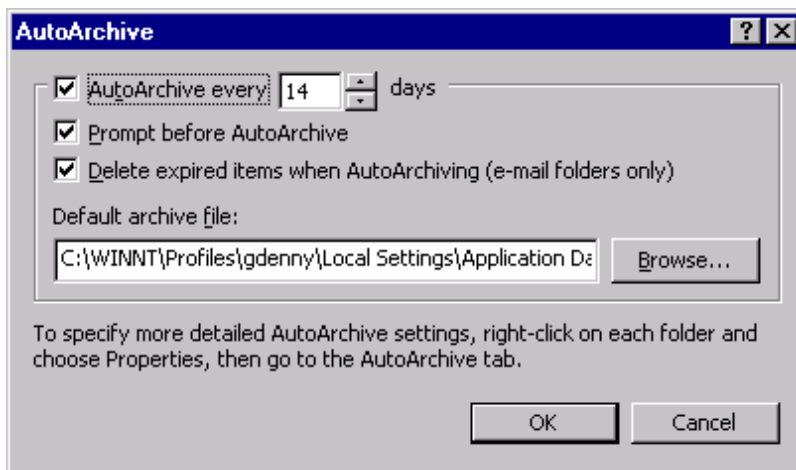


Using AutoArchive

Using AutoArchive is a two-step process. First you have to turn on AutoArchive then, for each folder, you set the AutoArchive options.

To Turn on AutoArchive

1. Select the **Tools, Options** command then display the **Other** property sheet.
2. Click the **AutoArchive** button.



3. Ensure that the **AutoArchive every...** check box is activated and enter how many days should be left between AutoArchives.
4. To be alerted before each autoarchive is carried out, activate the **Prompt before AutoArchive** check box.
5. If you have set an expiry date for mail items and you want items that have reached this date to be moved to the **Deleted Items** folder rather than archived, activate the **Delete expired items...** check box.
6. To change the default archive file, type the new name and path in the **Default archive file** text box or use the **Browse** button to display and select it.
7. Click **OK** to save these settings and close the dialogue box.



Using AutoArchive

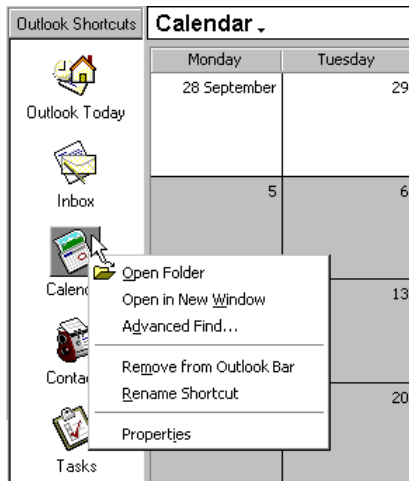
Setting the AutoArchive Options for a Folder

Some of the default folders provided with Outlook already have options set for AutoArchive. For example, items in the **Calendar**, **Tasks** and **Journal** are set to be archived if they're older than 6 months; and items in the **Sent Items** and **Deleted Items** folders if they're older than 2 months.

If you want to change the settings for these folders, or any other folder, you can do so.

To Set the AutoArchive Options for a Folder

1. In the Outlook bar, right click on the folder whose options you want to set or change.



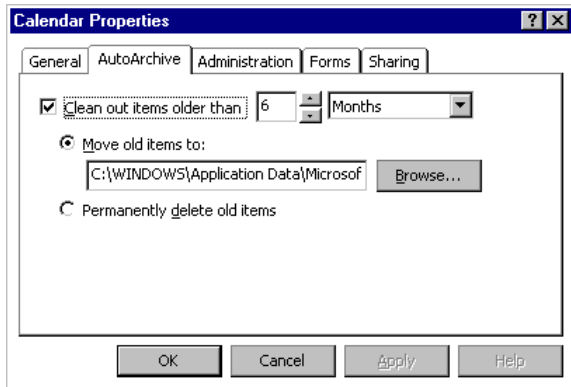
2. Choose **Properties** from the shortcut menu and click on the **AutoArchive** tab. /..



Using AutoArchive

../ To Set the AutoArchive Options for a Folder

The AutoArchive settings will be displayed.



3. To specify the age beyond which items should be AutoArchived, activate the **Clear out items...** check box and enter the required age.
4. To copy the selected items in this folder to the archive file before removing them from this folder, select the **Move old items to** radio button and enter the name of the archive file into the text box.

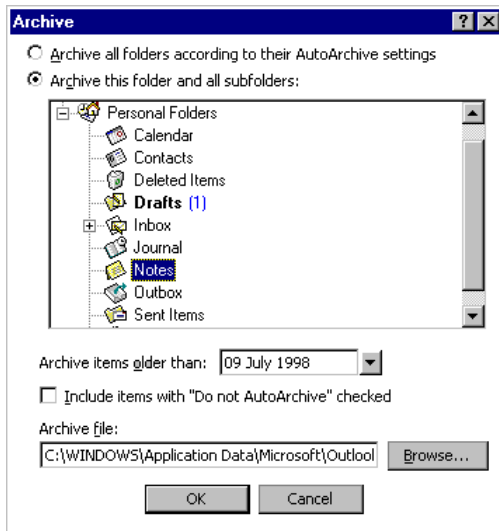
Alternatively, to delete items in this folder older than the specified age without adding them to the archive file, select the **Permanently delete old items** radio button.
5. Click **OK**.



Exercise 7-2

In this exercise you'll manually archive items in the **Journal** folder that were created before today.

1. Select the **File, Archive** menu option.



2. Ensure that the **Archive this folder and its subfolders** radio button is selected.
3. Click on the **Journal** folder to select it.
4. Click on the **Archive items older than** drop-down arrow and click on the **Today** button shown at the bottom of the small calendar.
5. To archive these items to a separate archive file called *course.pst* in the **Outlook 200 Intro Exercises** folder, edit the entry in the **Archive to** text box to use this file. The entry should read:

C:\Outlook 200 Intro Exercises\course.pst

Although this file doesn't exist, Outlook will create it for you.

6. Click **OK**.

All items created before today are now copied to the **course.pst** archive file and then removed from the **Journal** folder. This may take a few moments if you have a lot of entries in your journal.

7. Scroll through your journal to see that the only items in it are those you have created today.



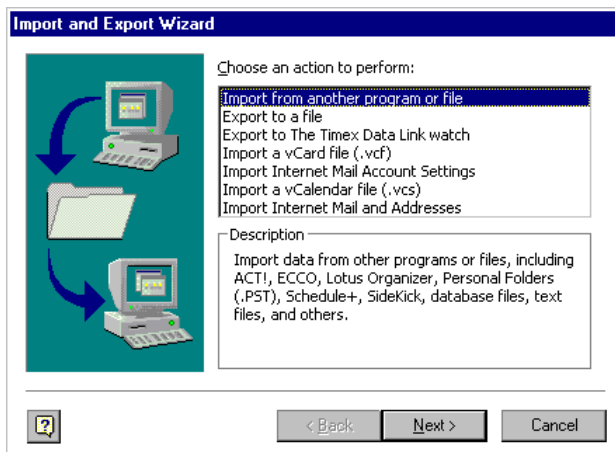
Retrieving Archived Items

If necessary, you can return archived items to their original folders from the archive file. Alternatively, you can create another file from archived items.

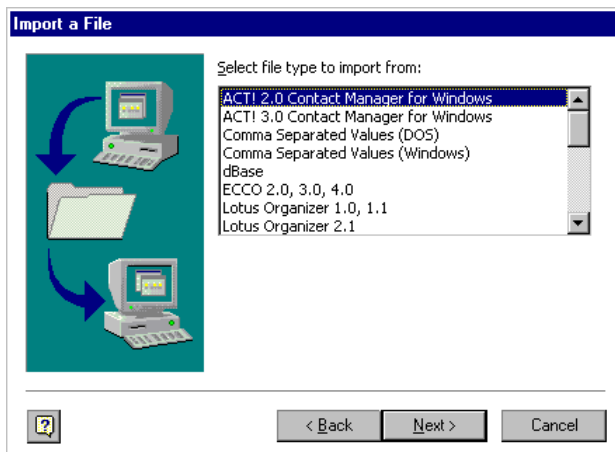
To Retrieve Archived Items

1. Select the **File, Import and Export** menu option.

The **Import and Export Wizard** dialogue box will be displayed.



2. Choose **Import from another program or file** in the list box then click the **Next** button.
/..

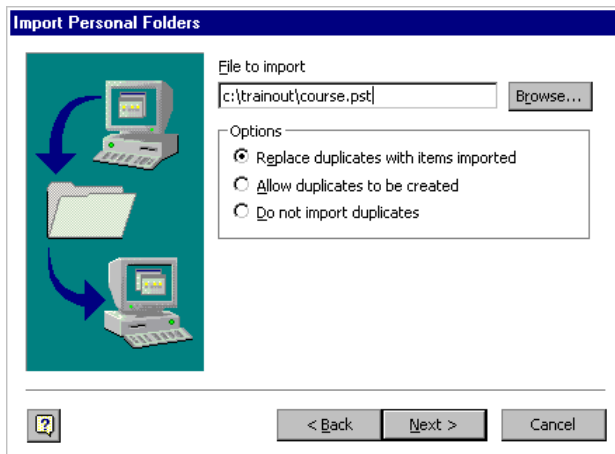




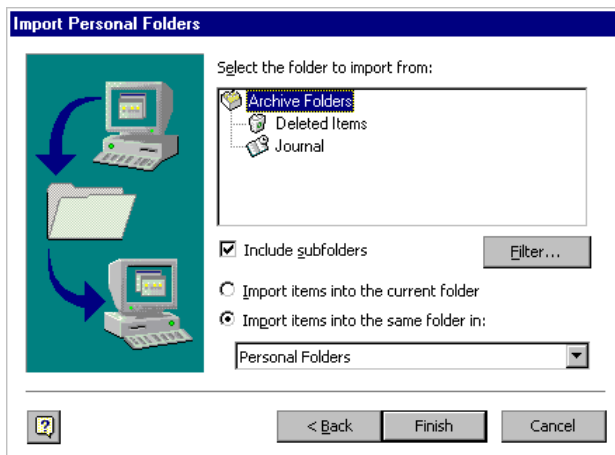
Retrieving Archived Items

../ To Retrieve Archived Items

3. Select **Personal Folder File (.pst)** then click **Next**.



4. Enter the name of the archive file in the **File to import** text box and choose the required options.
5. Click **Next**.



6. Select the folder(s) whose items are to be retrieved, activating the **Include subfolders** button if necessary.
7. To retrieve only some of the selected items, use the **Filter** button to specify the conditions under which items should be retrieved.
8. Choose either to **Import items into the current folder** or to **Import items into the same folder in:** and choose a mailbox.
9. Click **Finish**.

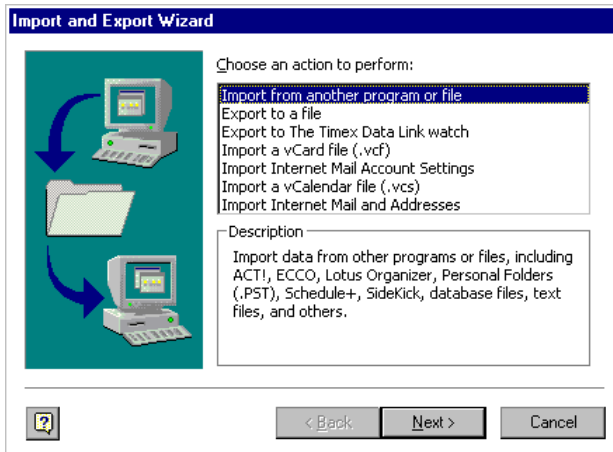
The selected items will be retrieved and placed in the specified folder(s).



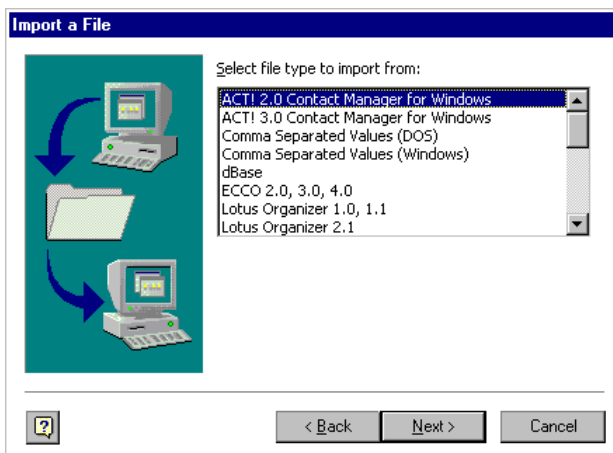
Exercise 7-3

Here you'll retrieve some of the journal entries that you archived in the previous exercise.

1. Select the **File, Import and Export** menu option.



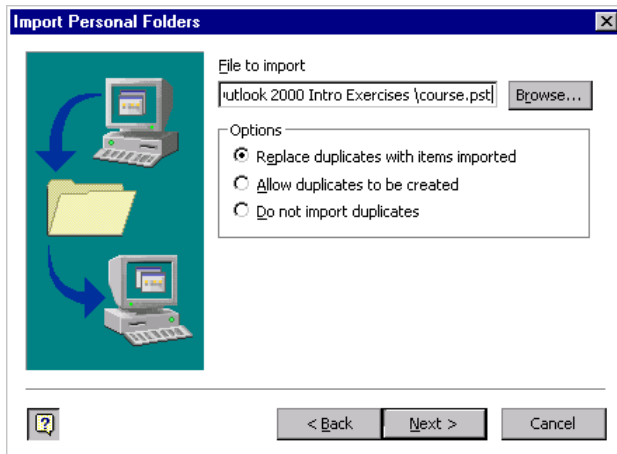
2. Choose the **Import from another program or file** in the list box then click **Next**.



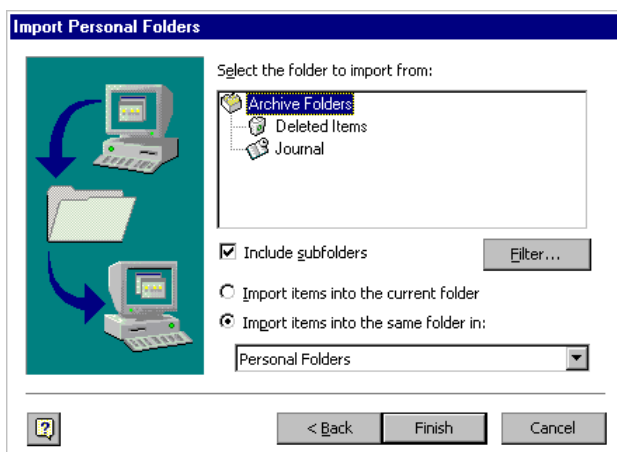


Exercise 7-3

3. Select **Personal Folder File (.pst)** then click **Next**.



4. Ensure that the entry in the **File to import** text box is the **course.pst** file that you created earlier (**c:\Outlook 200 Intro Exercises\course.pst**) then click **Next**.





Exercise 7-3

5. Select the **Journal** folder then click the **Filter** button.

The screenshot shows the Outlook Filter dialog box with the following settings:

- Tab: Messages
- Search for the word(s): [Empty]
- In: subject field only
- From...: [Empty]
- Sent To...: [Empty]
- Where I am: the only person on the To line
- Time: none
- anytime

6. So that only journal entries added to the journal in the last week are retrieved, select **created** from the **Time** drop-down list and **in the last 7 days** from the next.
7. Click **OK** to return to the wizard.
8. Ensure that the items will be retrieved to the same folder in your mailbox then click **Finish**.

The selected items are retrieved and returned to your **Journal** folder.

9. Scroll through your journal to see the entries that have been retrieved.
10. Use the **Import and Export Wizard** dialogue boxes to retrieve *all* journal entries.

Note: In the second of these dialogue boxes, select the **Do not import duplicates** radio button so that the entries that you've already retrieved are not retrieved again.



Questions and Answers

1. What does the Rules Wizard allow you to do?

2. What are the two methods of archiving older Outlook items?

3. What are the two steps to using AutoArchive?

4. How would you display the dialogue box that allows you to set the AutoArchive settings for an individual folder?

5. Which menu option is used to retrieve archived items?

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