A rule is an action that Microsoft Outlook 2013 performs automatically on incoming or outgoing messages based on the conditions and exceptions you specify in the rule. Rules can help you move, copy, delete, reply to, forward, and redirect your email. When creating a new rule, you can base it on one of the rule templates provided by Outlook or you can create it from scratch. Outlook includes a Rules Wizard that walks you through the process of creating a rule. This handout covers the general steps for creating a rule and uses automatically forwarding messages to another email address as an example. This may be helpful if you are going to be out of the office and want a colleague to handle inquiries in your absence. Keep in mind that rules are powerful tools that can inadvertently mishandle private or confidential messages, so it is highly recommended to carefully review each condition, action, and exception you set for a rule before applying the rule.

To create a rule using the Rules Wizard:

1. Click the Start button, click All Programs, click Microsoft Office 2013, and then click Outlook 2013. The program window opens, displaying the Mail module.
2. Click the File tab on the Ribbon, and then click the Manage Rules & Alerts button on the Info page of Backstage view (see Figure 1).
3. In the Rules and Alerts dialog box, on the E-mail Rules tab, click the New Rule button (see Figure 2).

![Figure 2 – Rules and Alerts Dialog Box](image)

4. On the first page of the Rules Wizard dialog box, in the Step 1: Select a template box, select one of the rule templates listed under the Stay Organized or Stay Up to Date categories, or select a blank rule listed under the Start from a blank rule category. The Step 2: Edit the rule description box lists the criteria and actions associated with the selected rule.
   - For this example, in the Step 1: Select a template box, under the Start from a blank rule category, click Apply rule on messages I receive (see Figure 3).
5. Click the Next button.

![Figure 3 – First Page of the Rules Wizard Dialog Box](image)
6. On the conditions page of the **Rules Wizard** dialog box, in the **Step 1: Select condition(s)** box, select the conditions under which you want the rule applied. If a condition requires additional configuration, click the underlined text in the **Step 2: Edit the rule description** box, and then set a value in the dialog box that opens.

   - For this example, in the **Step 1: Select condition(s)** box, select the check box next to **received in a specific date span** (see Figure 4). In the **Step 2: Edit the rule description** box, click the **in a specific date span** text to open the **Date Received** dialog box, select the desired dates, and then click the **OK** button (see Figure 5).

7. Click the **Next** button.

8. On the actions page of the **Rules Wizard** dialog box, in the **Step 1: Select action(s)** box, select the actions that you want the rule to take when the specified conditions are met. If an action requires additional configuration, click the underlined text in the **Step 2: Edit the rule description** box, and then set a value in the dialog box that opens.
• For this example, in the **Step 1: Select action(s)** box, select the check box next to **forward it to people or public group** (see Figure 6). In the **Step 2: Edit the rule description** box, click the **people or public group** text to open the **Rule Address** dialog box, locate and select the desired email address, click the **To** button, and then click the **OK** button (see Figure 7).

9. Click the **Next** button.
10. On the exceptions page of the **Rules Wizard** dialog box, in the **Step 1: Select exception(s)** box, select any exceptions to the rule. If an exception requires additional configuration, click the underlined text in the **Step 2: Edit the rule description** box, and then set a value in the dialog box that opens.
   - For this example, in the **Step 1: Select exception(s)** box, select the check box next to **except if it is marked as sensitivity** (see Figure 8). In the **Step 2: Edit the rule description** box, click the **sensitivity** text to open the **Sensitivity** dialog box, select the desired sensitivity level (e.g., **Confidential**), and then click the **OK** button (see Figure 9).
11. Click the **Next** button.

![Figure 8 – Exceptions Page of the Rules Wizard Dialog Box](image)

![Figure 9 – Sensitivity Dialog Box](image)

12. On the final page of the **Rules Wizard** dialog box, in the **Step 1: Specify a name for this rule** box, type a name for the rule. In the **Step 2: Setup rule options** section, make sure the **Turn on this rule** check box is selected (see Figure 10).
13. Click the **Finish** button to save the rule.
14. The new rule appears in the Rules and Alerts dialog box. Click the OK button (see Figure 11).

15. To exit the Backstage view, click the Back button in the upper-left corner of the view (see Figure 12). Or, press the Esc key.