

Create Outlook Rules

Transcript

[Title screen – ‘How to use create Outlook rules for MyPL system-generated emails’.]

Narrator: To set an Outlook rule, go to your email settings, then select Options.

[The option named Options is selected from the drop down list generated by clicking on the Settings icon in the upper-right corner of the Outlook Web App screen.]

Narrator: We would like to organise our email.

[Organize email is selected from a list of options in the left-hand ‘Options’ pane. It is the first selectable option within the Options sub-menu.]

Narrator: Select the (+) icon to add a new rule. Then select ‘Move messages from someone to a folder’.

[Inbox rules are displayed in the main body of the page. The ‘Move messages from someone to a folder’ option is selected from the drop down list generated by selecting the plus icon in the upper-left of the main body of the page.]

Narrator: Give the new rule a name.

[The new inbox rule dialogue box appears. The new rule name is entered into the Name field.]

Narrator: ‘Who it was received from’ is already selected, so we can just go ahead and select Select people.

[The ‘Who it was received from’ field is pre-selected. The ‘Select people’ action to the right of the field is then selected.]

Narrator: We now need to add the MyPL email address which can be found at the top of any MyPL system generated email.

[An information box indicates where the MyPL email address can be found in any email.]

Narrator: To add the address, click in the From field, then enter No-reply-MyPL@det.nsw.edu.au. Select the address. Click OK.

[A list of contacts is displayed. The required email address is selected from the drop down options list generated by typing the email address in the From field. The OK button is then selected.]

Narrator: Now we need to tell Outlook what it will do with the MyPL system emails. Select Select one and add a New Folder to send the MyPL emails to.

[The selected email address replaces the 'Select people' action text. The New folder button is selected from the Select Folder pane generated by selecting the 'Select one' action to the right of the 'Do the following' field.]

Narrator: Give the new folder a name, then click OK.

[Under the Inbox option in the pane, a new folder is added and named. The OK button is then selected.]

Narrator: Now Save the rule. Confirm you wish to apply the new rule.

[The selected folder replaces the 'Select one' action text. The OK button is selected on the warning dialogue box that appears when the Save button is selected.]

Narrator: Let's go back to our inbox.

[The main Outlook page appears when the back arrow in the upper-left side of the screen above the Options pane is selected.]

Narrator: Our new folder appears and we already have a new email. Let's take a look. The MyPL system generated email displays in the new folder.

[The MyPL system generated email appears in the main body of the page when the MyPL folder under Inbox is selected from the folders section to the left of the screen.]

Narrator: BUT you may not want every MyPL email sent to this folder. For example, you may want to separate MyPL emails that notify you of any catalogue items that require your attention. Let's set up another folder for catalogue action items. Select the Settings icon, select Options, then select organise email.

[Options is selected from the drop down list generated by clicking on the Settings icon in the upper-right corner of the Outlook Web App screen. The Organize email option is then selected from a list of options in the left-hand 'Options' pane.]

Narrator: Select the (+) icon and create a new rule for arriving messages.

[The 'Create a new rule for arriving messages' option is selected from the drop down list generated by selecting the plus icon in the upper-left of the main body of the page.]

Narrator: Give the new rule a name.

[The new inbox rule dialogue box appears. The new rule name is entered into the Name field.]

Narrator: From the droplist, select 'Include these words in the subject'.

[The 'Include these words in the subject' option is selected from the drop down list generated by selecting in the 'Who it was received from' field.]

Narrator: Then specify the key words that will appear in the subject line. In this example, we'll enter: 'A catalogue item requires your attention'. Then click OK.

[A dialogue box appears. The OK button is selected after typing in the required key words 'A catalogue item requires your attention' in the text field.]

Narrator: Then from the droplist, select 'Move the message to folder'.

[The 'Move the message to folder' option is selected from the drop down list generated by selecting in the 'Do the following' field.]

Narrator: Then select the new folder location.

[The 'Select one' action to the right of the 'Do the following' field is selected.]

Narrator: Let's create a MyPL sub-folder. We'll call it 'Course Endorsement'.

[Under the Inbox option in the Select Folder pane, the MyPL folder is selected. The sub-folder created by selecting the New Folder button, is named 'Course Endorsement'. The OK button is then selected.]

Narrator: Click OK. Now Save the rule.

[The OK button is selected on the warning dialogue box that appears when the Save button is selected.]

Narrator: When an email with our selected keywords in the subject line comes in, it will appear in our selected folder. This process can be replicated for any new MyPL folder you would like to create in Outlook.

[The main Outlook page appears. The system generated email appears in the main body of the page by selecting the Course endorsement sub-folder under the MyPL folder under Inbox in the folders section to the left of the screen.]