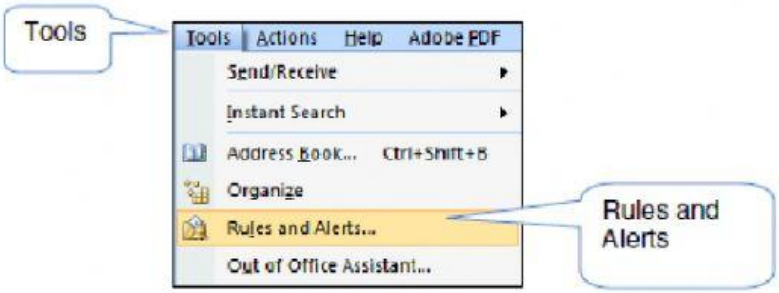
Lesson 5 RULES and Sharing

Anything we do in life, there are always rules. Outlook is no exception.

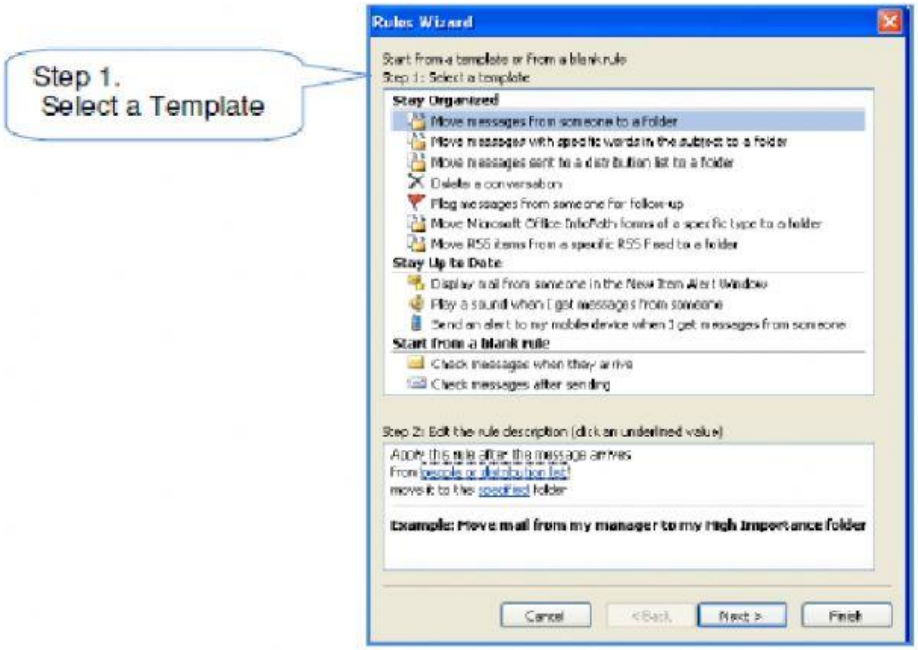
Adding a rule to Outlook.

You can set up **Rules** in your **Microsoft *Outlook*** program to organise the way messages are handled once they are delivered to your *mailbox*. To do this you will need to use the **Rules Wizard**. You will find the rules wizard buy selecting tools from the ribbon and then selecting **Rules and Alerts**. From the resulting drop down list.



The next step is to select New Rule from the top of the resulting window. The Rules Wizard window will then open and this is where you start to select the conditions for your new rule.

The first section of your **Rule Wizard** window has a list of some rules which you may wish to activate for your own use. This section is **Step 1**. Select a template. There is also a section where you can make your own rule.



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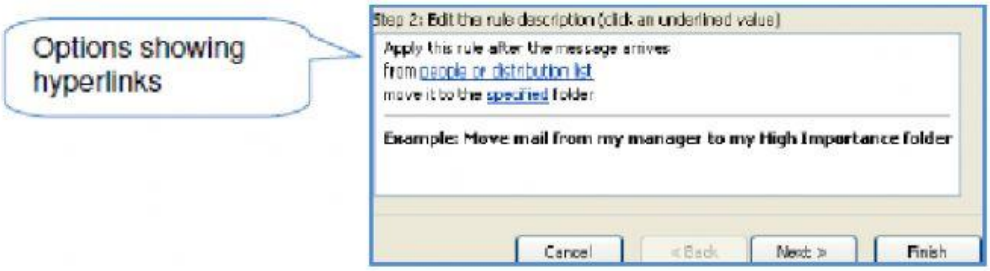
The next step is to choose an option from this list. Once you have chosen an option you can move on to Step 2, from the bottom of the window. This step gives you the ability of when and how you apply the rule. In the following example I have chosen the first option from **Step 1.** This option is - *Move messages from someone to a folder*.

Step 2 is at the bottom of the window. The options in **Step 2** change according to the selection you have made in Step 1. This example shows the options for the selection above. You will see that some of the text is *hyperlinked*, this means that you can click on it and it will open another window from where you can choose your options.



If you choose the *people or distribution list*, *hyperlink* the **Outlook** address book will open and you can choose either a person or distribution list from your options. If you choose the *specified*, hyperlink your folder list will display and you can choose which folder you would like your messages delivered to .

Once you have made your selections from these options click on **Next** at the bottom of the window. You will then have the option to put specific conditions and exceptions on your rule. Click on **Next** and you will be able to give your rule a *name, run the rule, and Turn it on or off.*

Click on **Finish** and your rule will be in effect.

If you choose the start from the *blank* rule, option you can make your own rule from the options presented.

Make your selections from the menu and keep choosing **Next** until you have set all the conditions for your rule.

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Sharing

Sharing mail and Calendars.

These instructions are for sharing your mailbox, email folders and other MS Outllook items such as calendars and tasks.

Sharing Outlook items with other users involves three steps:

1. Setting up permission for a user to access your Outlook Today which is the top level of your mailbox. This step includes making sure that this top level is visible to the other user.
2. Setting up permission for the actual folders or tasks in your mailbox that you wish others to access. This includes specifying the level of access they are allowed to have.
3. Finally, after granting permission, making sure the user you are setting up accepts the permission you have granted, and that they decide whether to:

    a. Access your information on an as result basis, or
    b. Have your folder/s on view all the time, in the same way as they view their own information.

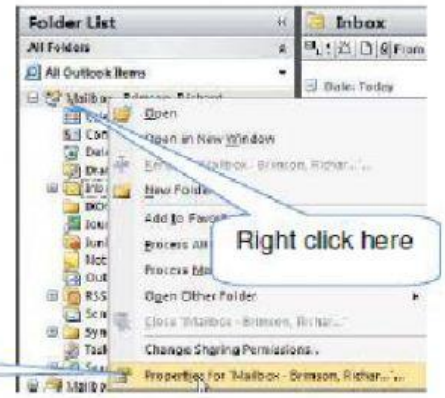
Note: If you are being set up to view someone else's folder/s. It is a good idea to have the **FOLDERS** LIST showing. To turn this on when you have opened *MS Outlook*, click on the **VIEW** menu and select **FOLDER LIST**.

Setting up permission for a user to access Outlook in your behalf.

1 Open Microsoft Outlook.

2. Right Mouse click on the Mailbox folder

3. Select PROPERTIES FOR "Mailbox" option from the shortcut menu.



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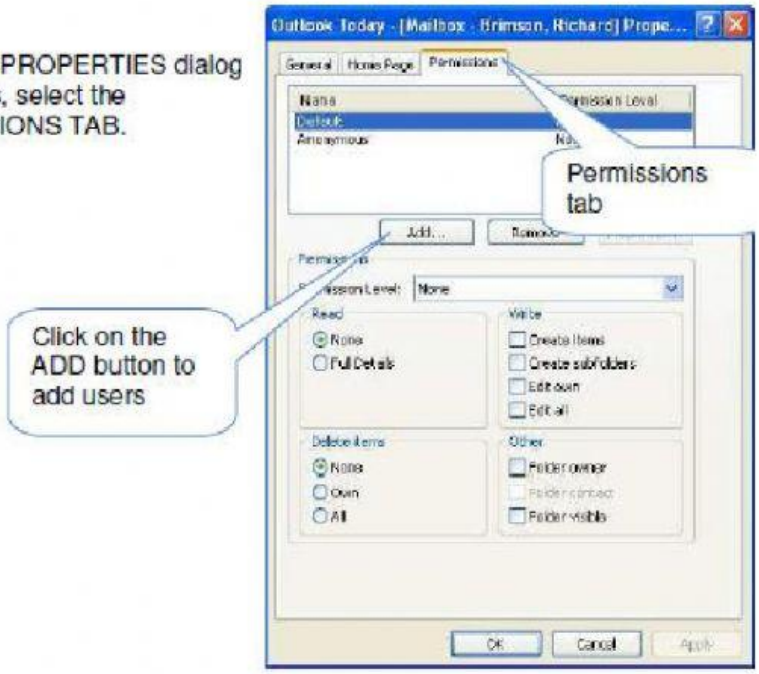
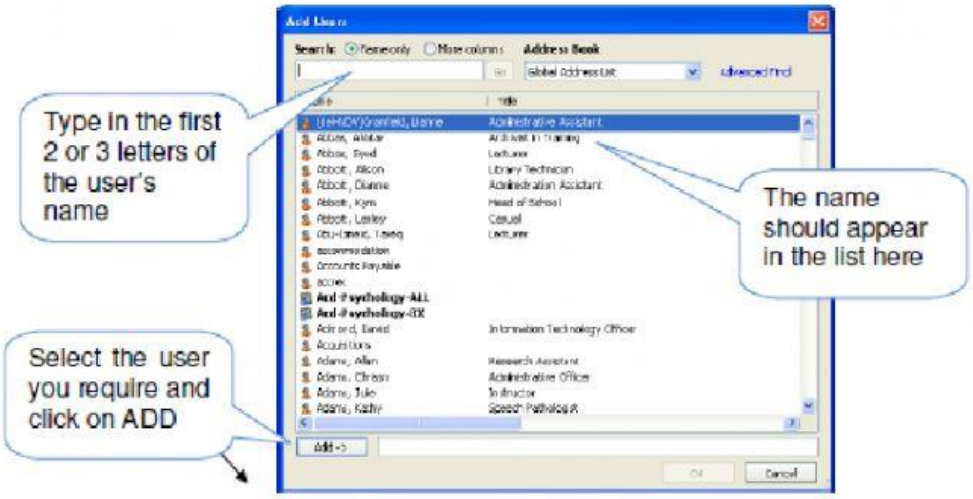
4. When the PROPERTIES dialog box opens, select the PERMISSIONS TAB.



5. Click on the ADD button to add the logon ID of the person you wish to share your MS Outlook folders with. The ADD USERS dialog box will open.



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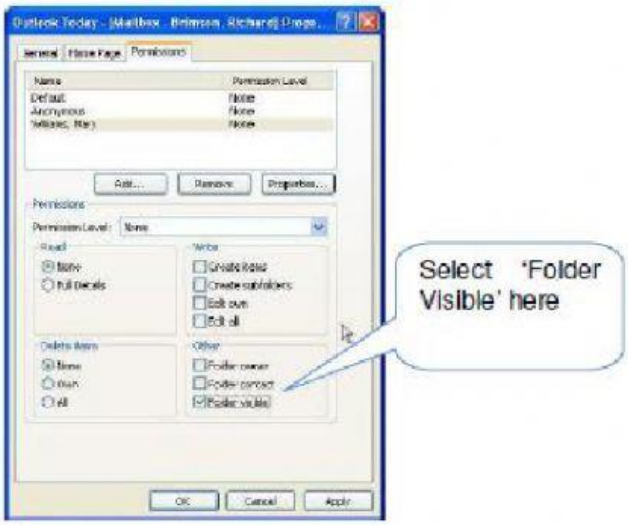
6. In the 'TYPE NAME OR SELECT FROM LIST' text box, type the first two or three letters of the person you wish to add. When you see their name in the NAME list, either double click on it or click on the ADD button. The name should then appear in the ADD USERS list on the right hand side of the dialog box. Click on OK to finalise this step.

7. You will be returned to the PROPERTIES dialog box. You should be able to see the person's name in the NAME box. To make sure that the user will be able to see your Outlook Today, click on the FOLDER VISIBLE option. Change the Permission level to NONE.



8. Click on OK – the PROPERTIES dialog box will close.

Setting up permission for specific folders or features in Outlook

1. If setting up your Inbox for another user to access, right mouse click on your Inbox and select PROPERTIES. The INBOX PROPERTIES dialog box will open.

2. Click on the PERMISSIONS tab.

3. Click on the ADD button to add a user, in the same way you added a user in steps 5 and 6 of the previous section. Their name will appear in the NAME text box.

4. Make sure the FOLDER VISIBLE option is enabled. This will let people see your Inbox in their Folder List.

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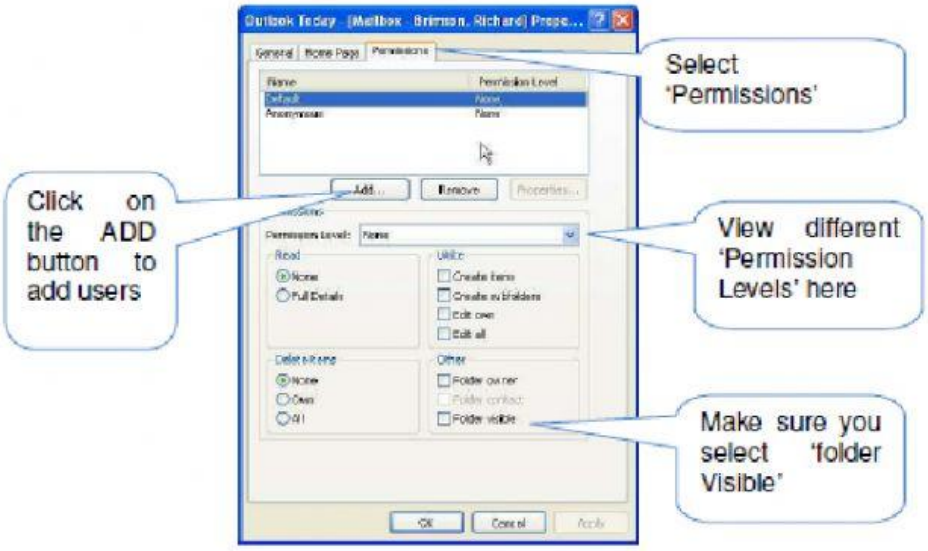

5. Select the different options required, to see what the options are, click on the drop down menu next to **'Permission Level'**. The different Permission Levels are described below:

With this permission level (or role)	You can
Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author	Create and read items and files, and modify and delete items and files you create.
Contributor	Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)

Reviewer	Read items and files only.
Custom	Perform activities defined by the folder owner. (Does not apply to delegates.)
None	You have no permission. You can't open the folder.

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6. After setting up the Inbox, right mouse click on any subfolders that you sish to grant access to and repeat steps 2 to 5 . You can only do one folder at a time.

Questions

1. **Describe how you to add Rules on Outlook?**

2. **What are the different permission levels?**

3. **What are the three option to share mails and calendars.?**

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