



MARK5 | *Rules module guide*

0.0 | *Welcome*

In this guide we will help you understand and use the Rules Module in MARK5. This will help you organise your inbox for better overview.

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1.0 | Short-keys

Combine with nothing Combine with Alt EDITOR SHORT KEYS: Combine with Ctrl Combine with Ctrl Combine with Ctrl + Shift

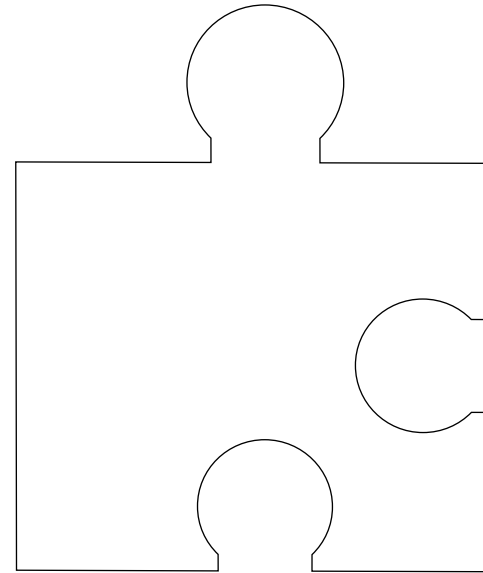
Esc	F1	F2 ADD EXTERNAL DOCUMENT CREATE NEW EMAIL	F3 SCROLL BETWEEN EMAILS	F4 SCROLL BETWEEN EMAILS	F5 EDIT/SEND DOCUMENT	F6 REPLY ALL REPLY EMAIL	F7 FORWARD EMAIL	F8 SEARCH	F9 SHOW ACTIONS	F10	F11	F12	Print Screen	Scroll Lock	Pause Break		
.	1 ASSIGN TO CATEGORY	2 ASSIGN TO CATEGORY	3 ASSIGN TO CATEGORY	4 ASSIGN TO CATEGORY	5 ASSIGN TO CATEGORY	6 ASSIGN TO CATEGORY	7 ASSIGN TO CATEGORY	8 ASSIGN TO CATEGORY	9 ASSIGN TO CATEGORY	0 QUICK EDIT FILTER	-	=	\	Insert	Home VIEW LATEST RECEIVED DOCUMENT	Page Up JUMP BETWEEN DOCUMENTS	
Tab ↵	Q FILE TO FOLDER	W COPY TO PERSONAL WORKTRAY	E CENTER	R ACCESS RIGHTS ALIGN LEFT	T EDIT TEMPLATE INSERT TEMPLATE	Y COPY TO USER WORKTRAY	U UNDERLINE	I INTERNAL MESSAGE ITALIC	O ADD COMMENT OPEN FILE	P PRINT	{ [}	Enter ↵ SEND EMAIL	Delete	End VIEW FIRST RECEIVED DOCUMENT	Page Down JUMP BETWEEN DOCUMENTS	
Caps Lock	A SELECT ALL	S SEARCH FOR FOLDER DOCUMENT TRANSMIT STATUS SAVE	D	F FIND WORD	G	H REPLACE	J	K	L ALIGN LEFT	:	"						
Shift	Z UNDO	X CUT	C OPEN CATEGORY WINDOW COPY	V PASTE	B BOLD	N	M NEW INTERNAL MESSAGE	<	>	?	Shift	Turbo				↑ SCROLL WITHIN EMAIL MOVE FOLDER UP	
Ctrl		Alt	MARK DOCUMENT AS READ				Alt			Ctrl			←			↓ SCROLL WITHIN EMAIL MOVE FOLDER DOWN	→

2.0 | Rules

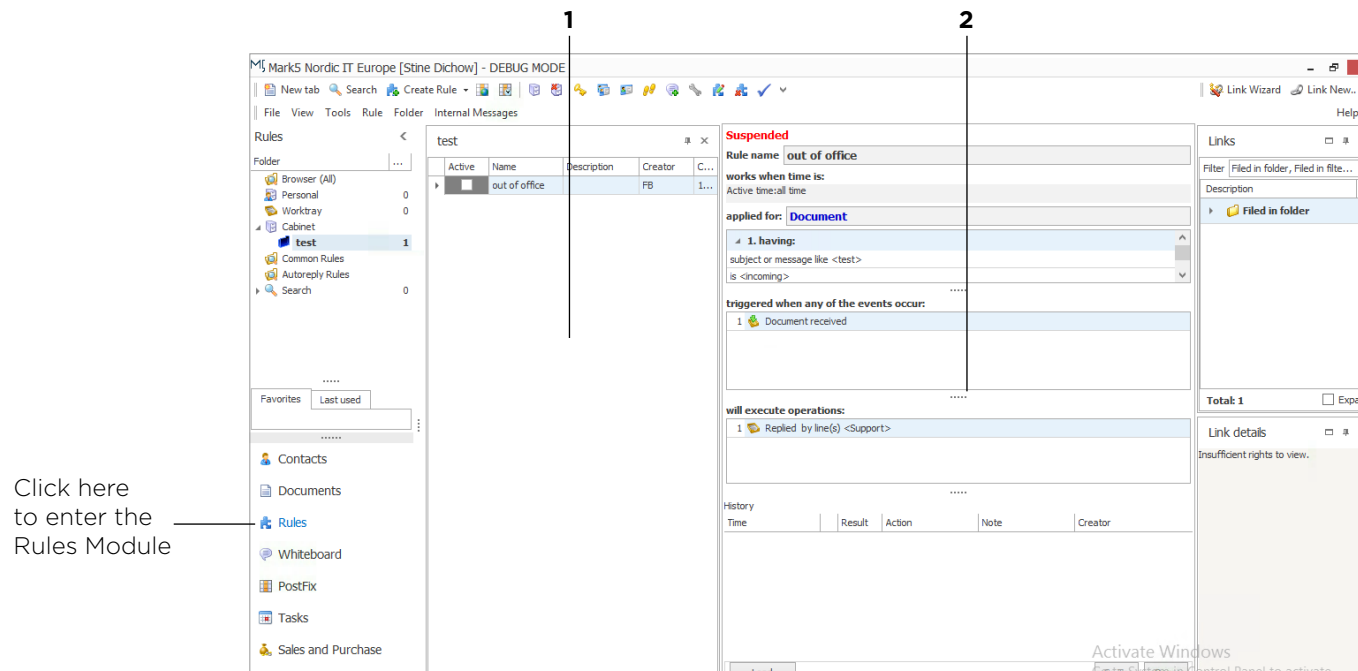
The **Rules Module** is your gateway to manage how objects are **filtered** in MARK5 and works as an automatic organiser. **Rules** can be used not only in regards to emails, but also to filter other objects within MARK5. The Rules in MARK5 is highly detailed and has any option you can think of available to manage how everything is linked and organised in your inbox or system.

In this guide we will first go through the **rules work area** and then we will learn to **create a new rule**. By the end of this guide you will have a better foundation for navigation in the module as well as creating rules for better optimisation in the system.

NOTE | To keep order in the system we recommend that only **super-users** handle, create, edit and delete rules.



2.1 | Rules work area



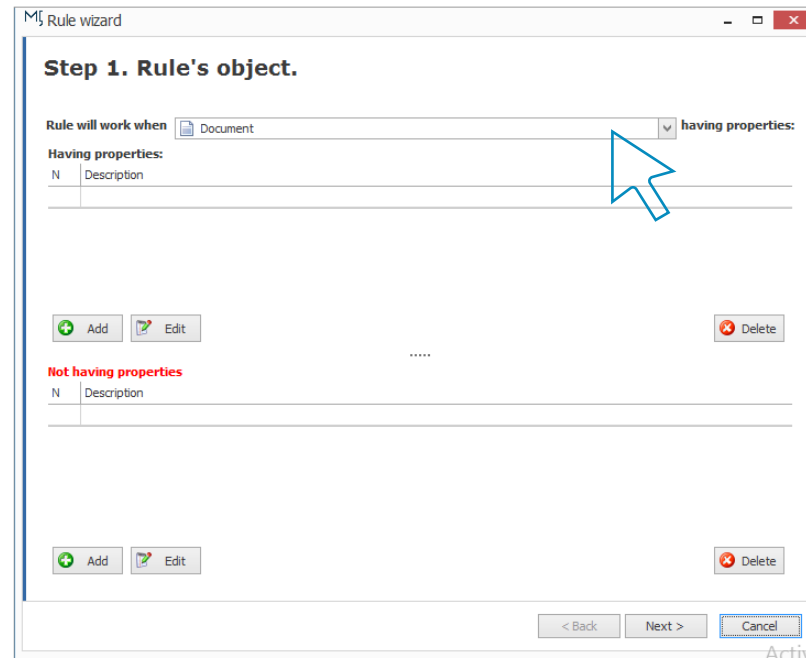
Lets start by getting familiar with the [rules work area](#). You can access the module through the [navigation area](#) in the lower left corner of the MARK5 interface. If you cannot find rules here, look for the extra icons just below and find rules. When you click rules you will experience your MARK5 work area changing. It will now look similar to the screenshot.

What you see changing is the [menu](#) as well as the [object list](#) in the middle of the [work area](#). You still find [folders](#) and [link details](#) in their regular space. But let us take a closer look at what is now available from our workspace. The major change is in the [object list](#). This is where we used to have emails. Now we have two columns.

1 | Rules overview: Here we find the [rules list](#). This is a preview of [existing rules](#) in the system. To view details of a specific rule, mark the rule. You can also right click on the rule, this gives you the option to [edit](#), [delete](#) or [set inactive](#) or [active](#).

2 | Rule details: Here we have a [detailed description](#) of the rule in question. You can see any [criteria](#) that the rule operates from.

2.2 | Create rule



In the [rules module](#) you will see that your menu now has a section called [rules](#). This is your gateway to handling the module. Now, let us go through how to [create a new rule](#): Go to the main menu and click [create rule](#). You can also create a rule from any other module in MARK5. Just go to the menu, click the dropdown beside create document and select [create rule](#). This will open the [Rule wizard](#), as shown in the screenshot.

First, you have to select what kind of [object](#) in the system triggers the rule to work: Which kind of object do you want to add a rule to? It can be any kind in MARK5: [contact](#), [document](#), [rule](#), [ship](#), [commercial advice](#), [purchase request](#), [cargo position](#), [ship position](#), [shortcode](#), [whiteboard](#), [position fixture](#), [appointment](#), [task](#), [aim journal](#), or [aim daily report](#). In this example, we choose [document](#), as we want to create a rule, that checks [incoming mails](#) for a specific email address and then files them into [worktray](#).

Next, we have the possibility to [add having properties](#) and/or [not having properties](#).

NOTE | [Having properties](#) refers to criteria you enter that should be in the object. [Not having properties](#) refers to criteria you want to make sure are not in the object.

If you want to add criteria that should be in the object, choose [having properties](#). If you want to add criteria that should not be in the object, choose [not having properties](#). Regardless, click [add](#), and a new window, similar to the screenshot on the next page, will appear.

2.2 | Create rule

The screenshot shows the 'Search Condition' dialog box with the following settings:

- Search Text Where: Subject OR Message Same
- Search String: (empty)
- From AND To: From
- From: nordic-it.com
- To: (empty)
- Reference: (empty)
- Category: (empty)
- Direction: Incoming
- Priority: (empty)
- Type: (empty)
- Comm. lines: (empty)
- Creator: (empty)
- Unread:
- Date range: None, from 01-01-1753 to 01-01-1753
- Comment: (empty)
- Attachment name: (empty)
- Having Attachment Only:
- Voy No OR t: (empty)
- Filed in folder: None, Any
- Processed: Show all, Show handled, Show not handled
- Workflow: (empty)
- Search in SPAM folder:
- Search in delivery reports:
- Search in archives:
- Force to use index: (empty)

As you can see, this window is identical to the search window. This is where you type in [conditions](#).

NOTE | You cannot enter anything before you go to direction and choose whether to search for [incoming](#), [outgoing](#) or both. This will allow you to enter criteria into any variable in the window.

Firstly, you have to choose the direction (incoming, outgoing or both).

In the search string you type in criteria's. In [from](#) and [to](#) you can search for specific addresses. In [category](#) you can search for documents assigned to a certain category. In [direction](#) you choose [incoming](#), [outgoing](#) or both.

In [comm. lines](#) you can specify which email addresses the mails should come from. In [creator](#) you search for a specific users emails. [Date range](#) allows you to search in a specific period. In comments you can filter through comments in documents.

In this example we want a rule that searches for [incoming mails](#) from the address: nordic-it.com. Choose [incoming](#) in [direction](#) and enter the [address](#) in the [from field](#). When you have finished press [ok](#).

We now return to the previous window (see previous page), where you have the possibility of [adding more criteria](#) to both [having properties](#) and [not having properties](#). When you want to continue, press [next](#) and a new window pops up.

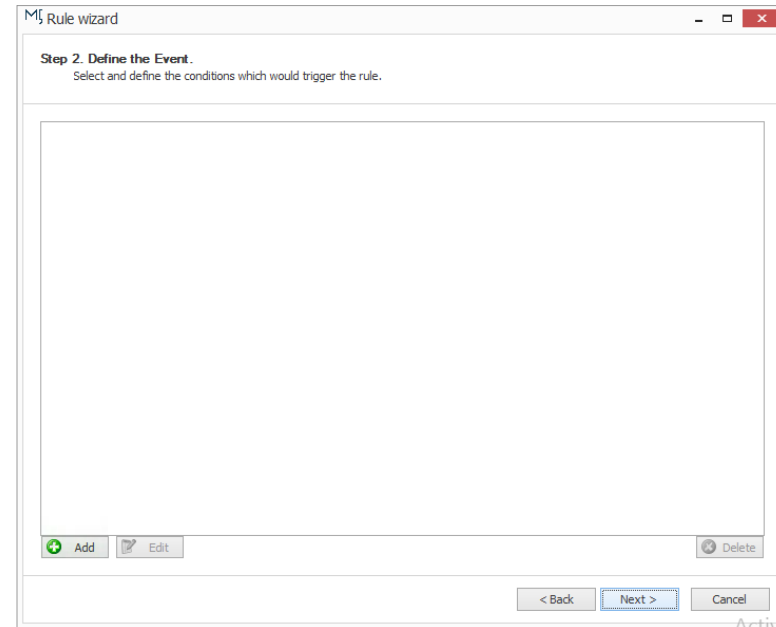
2.2 | Create rule

1 | Here you define the event that triggers the rule. To **create event**, press **add** and you will find the **edit triggering event window**.

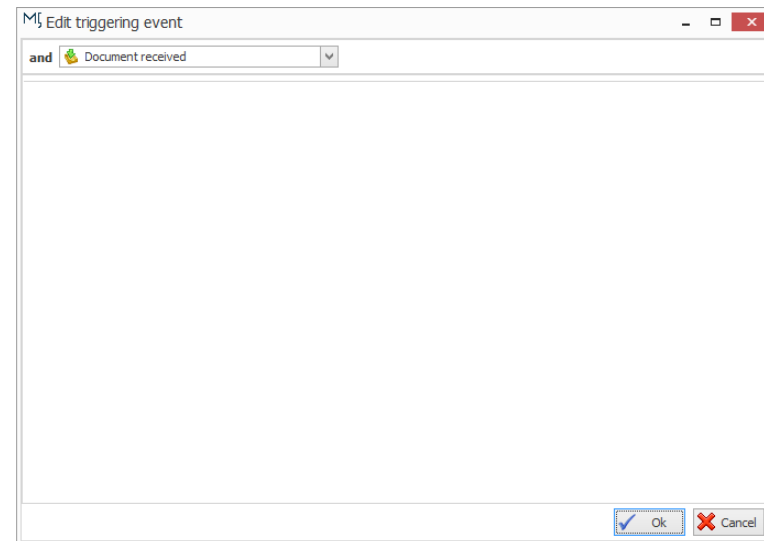
2 | First, look to the top of the window. Here, define **and**. Here, you can choose what kind of event or action triggers the rule. You can choose either **filed in folder**, **document sent**, **document received** and so on. In this case we choose document received, as we want to search for incoming messages from a specific mail address. The event will then be, that the system receives a mail from the address.

When you choose **document received**, you get **receive options** just below. Here, you can specify the mail address in relation to the event. When you have finished, press **ok**. This will allow you to return to the **rule wizard window** (page 06). Here, you can choose either to **add more triggering events** or you can continue. To do so, press **next**.

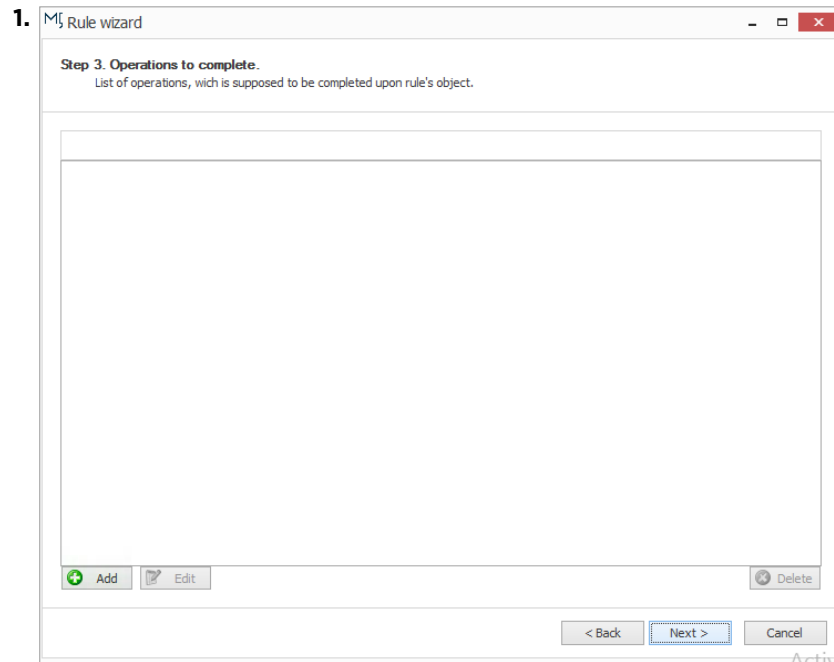
1.



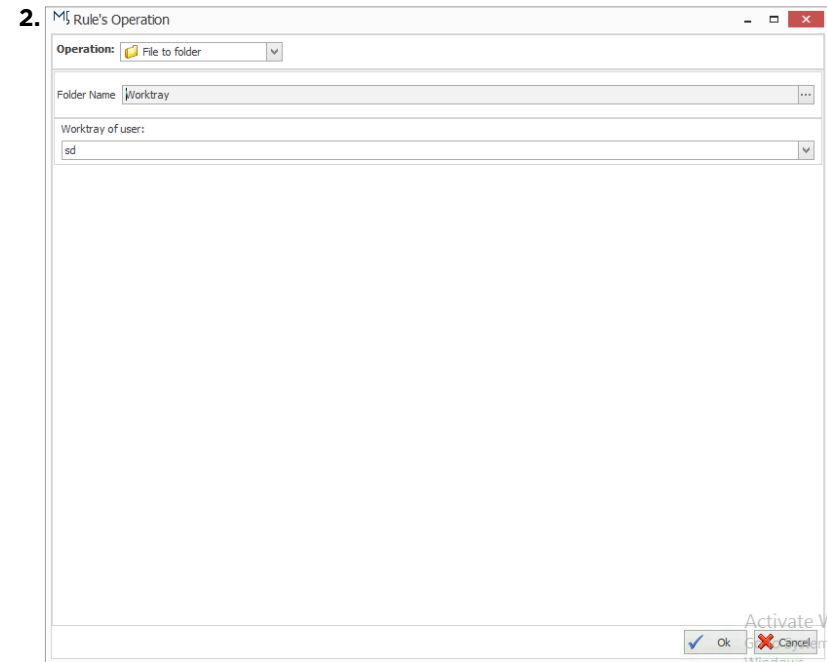
2.



2.2 | Create rule



Now you will see the [Rule Wizard window](#). Here, we have to define the [action](#), we would like the rule to do, after finding a document that meets the triggering conditions. To do so, press [add](#) and you will see a window similar to screenshot 2.



Here, you can specify, what you would like the rule to do when the criteria is met: You can choose between many different variables, you can: [change rights to](#), [print](#), [send message](#), [file to folder](#), [add comment](#), [assign category](#), [send document](#), [change priority of document](#) and [create appointment](#). In this example we choose [file to folder](#). In [folder name](#), look to the right side of the screen and press ... in order to specify folder. In this example we choose [worktray](#), as we want everything to go automatically into the worktray. Below, you can specify the [worktray](#) of a [specific user](#). When you are done, press [ok](#). This will let you return to the [operations window](#) (screenshot 1), where you can either [add more operations](#) or press [next](#). If you add more categories you can for example [automatically categorise](#), [add comment](#) or [send reply](#). In this example we just move on by pressing [next](#).

2.2 | Create rule

This will open the [additional parameters window](#) or [step 4](#). Here you give the rule a [name](#) and [description](#).

Now, let us take a look at the [time settings](#). Time can be defined either to be active from the time you create the rule or, you can define the time so the rules works at specific days, dates or hours. That way you can choose specifically, when the rule is active.

Let us look into how you [define time](#):

When you define the time, you define [when the rule should work](#). The first step is to choose between [active all time](#) or [define active time](#):

[Active all time](#) is your best option if you want to set the rule to search from time of creation.

[Define active time](#) allows you to specify in which [hours](#) and [weekdays](#) the rule should search.

The second step is to specify further in the next column where you choose between [active from now](#) and [define active period](#): [Active from now](#) is what you choose if you want the rule to work [from time of creation](#).

[Define active period](#) is what you choose if you want to define [specific dates](#) or a [specific period](#) in which the rule works.

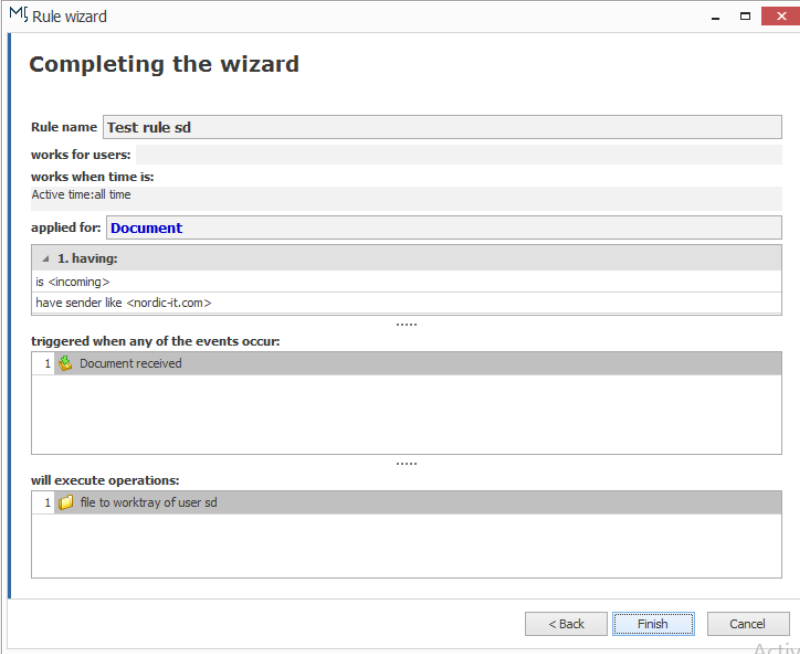
In this example, we want the rule to work from time of creation, therefore choose [active all time](#) and [active from now](#).

NOTE | Pay attention to [rule enabled](#) (Blue arrow). If you do not want the rule to work from the time of creation, if you e.g. what to create a rule for [later use](#), [uncheck the mark](#).

To continue, press [next](#).

2.2 | Create rule

We have now arrived at the final window: [completing the wizard](#). Here you can see anything that triggers the rule and how it operates. To [confirm](#), press [finish](#).



The screenshot shows the 'Completing the wizard' window in Microsoft Exchange. The window title is 'Mj Rule wizard'. The main content area is titled 'Completing the wizard' and contains the following fields and sections:

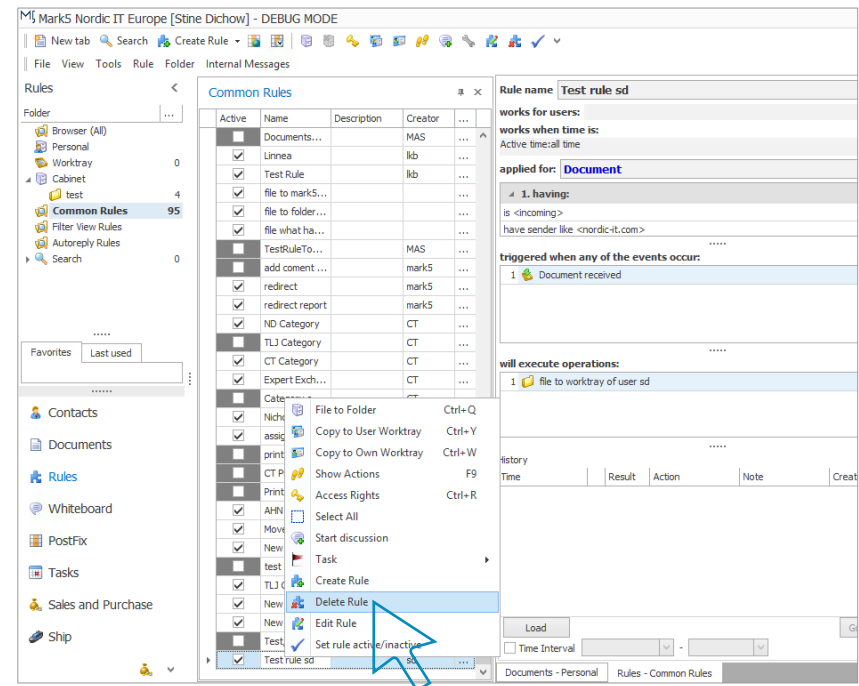
- Rule name:** Test rule sd
- works for users:** (empty field)
- works when time is:** Active time: all time
- applied for:** Document
- 1. having:**
 - is <incoming>
 - have sender like <nordic-it.com>
- triggered when any of the events occur:**
 - 1 Document received
- will execute operations:**
 - 1 file to worktray of user sd

At the bottom right, there are three buttons: '< Back', 'Finish', and 'Cancel'. The 'Finish' button is highlighted with a blue border.

2.3 | Delete rule

An **existing rule** can be found in the **list** in the **rule module**. You can always **delete** a rule if you do not need it anymore. Just **mark** the rule in question from the rule module, **right click** and choose **delete**.

To **edit** or **set rule active/inactive** you can follow the **same procedure** as we did to delete: **Mark** the rule in question from the rule module, **right click** and choose **edit** or **set rule active/inactive**.



EXERCISE | Create a new rule based on the following criteria:

- 1) The rule should work when the object is a document,
 - 2) The rule should search for incoming mails from the email address nordic-it.com and
 - 3) The rule should file documents to the folder: worktray.
- Find the new rule from the rules module, mark the rule and delete it.