NORDIC

MARK5 | *Rules module guide*

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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

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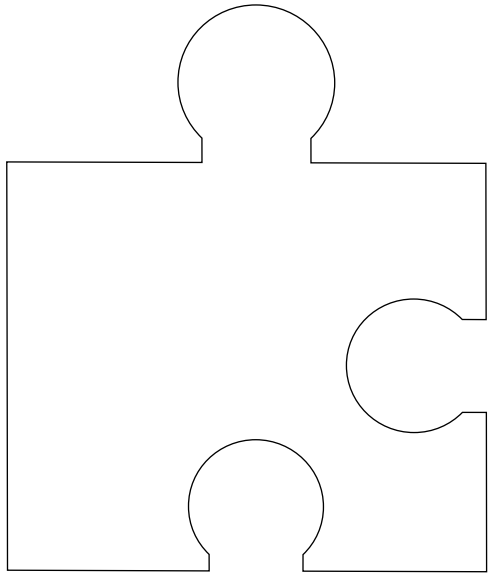
2.0 | *Rules*

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.



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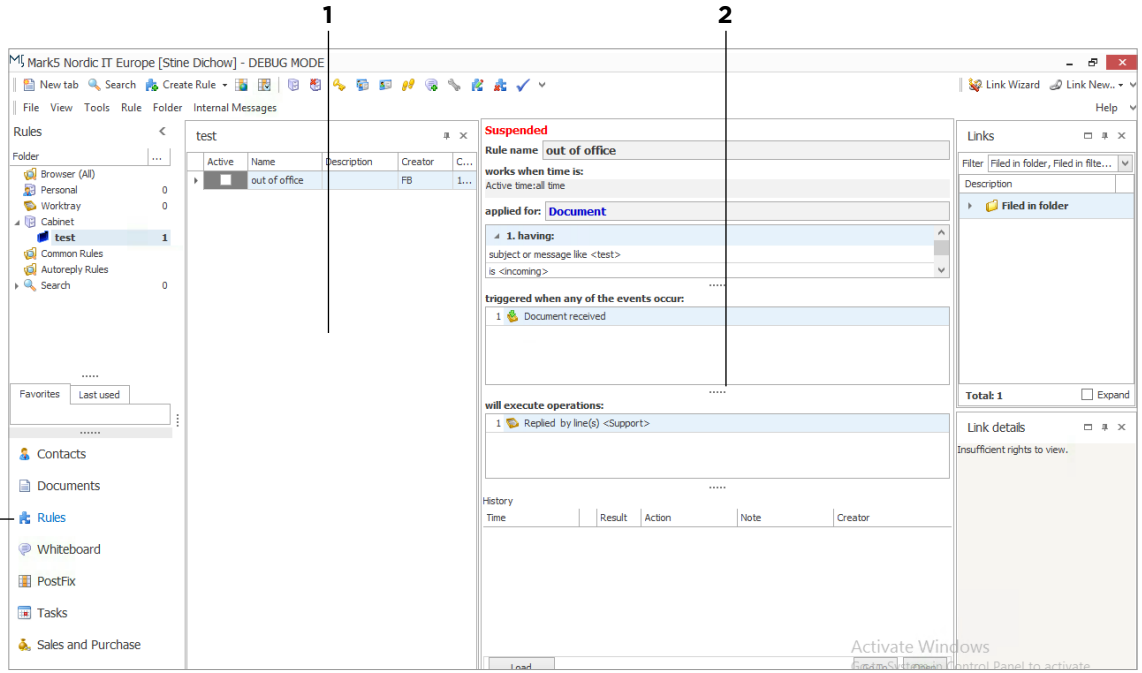
2.1 | *Rules work area*



Click here to enter the Rules Module

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.

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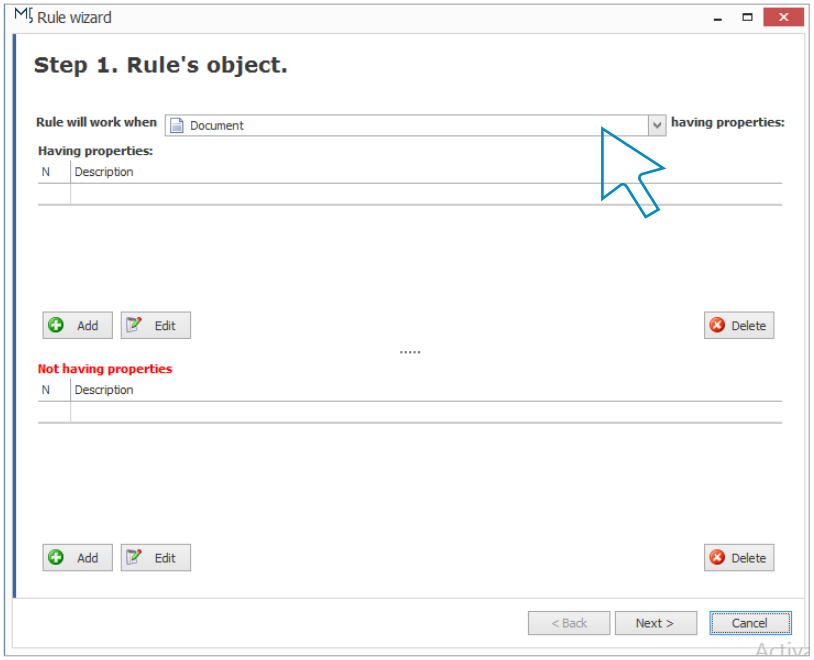
2.2 | *Create rule*



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.

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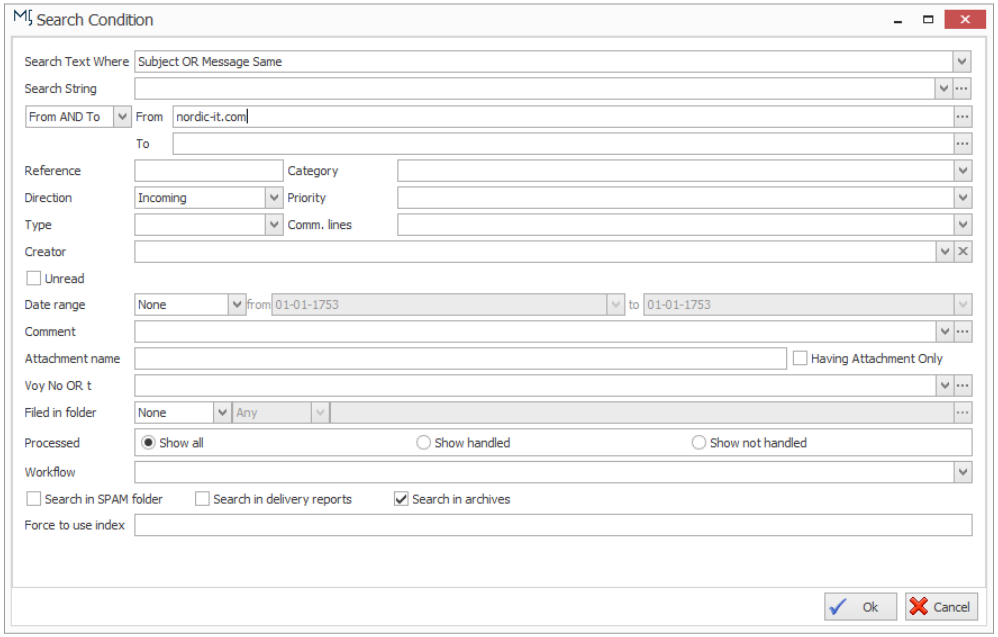
2.2 | *Create rule*



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.

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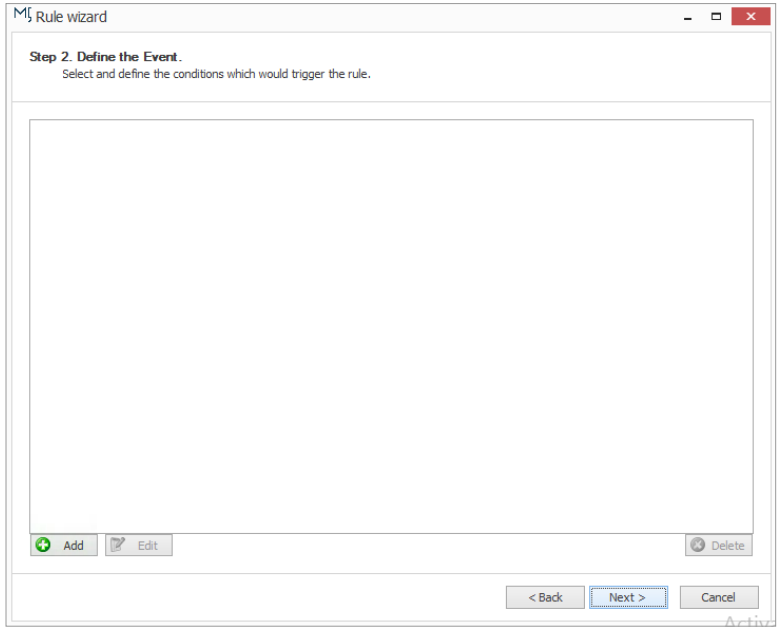
2.2 | *Create rule*

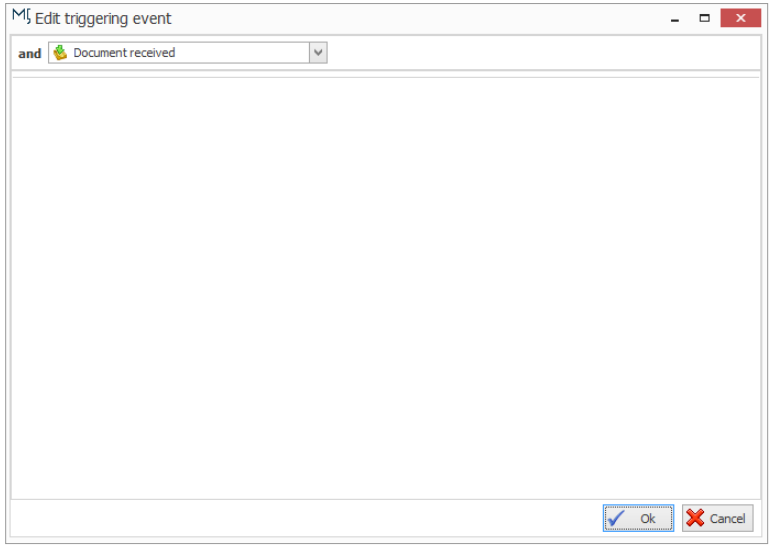
1 | Here you define the event that triggers the rule. To **create event**, press **add** and you will find the **edit triggering event window**.

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.



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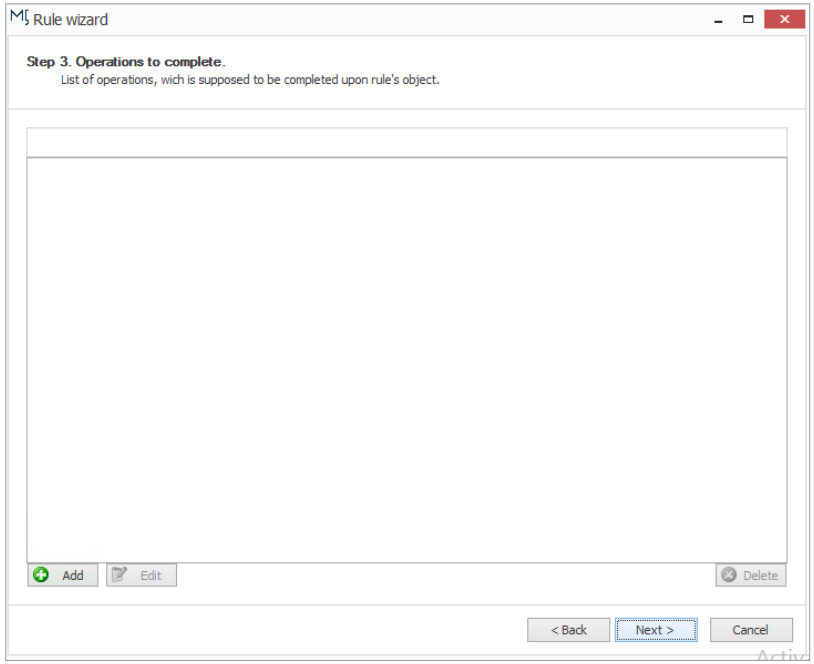
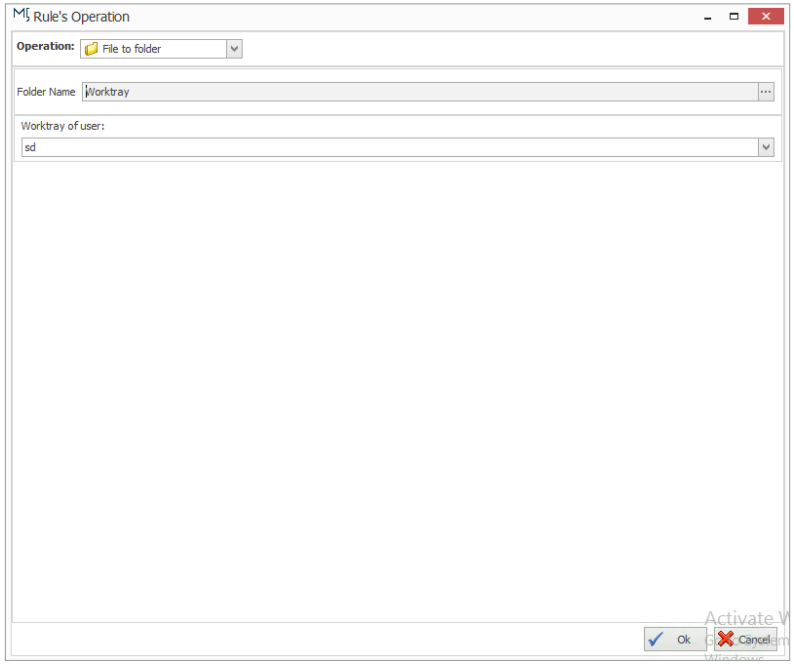
2.2 | Create rule

1.



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.

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.

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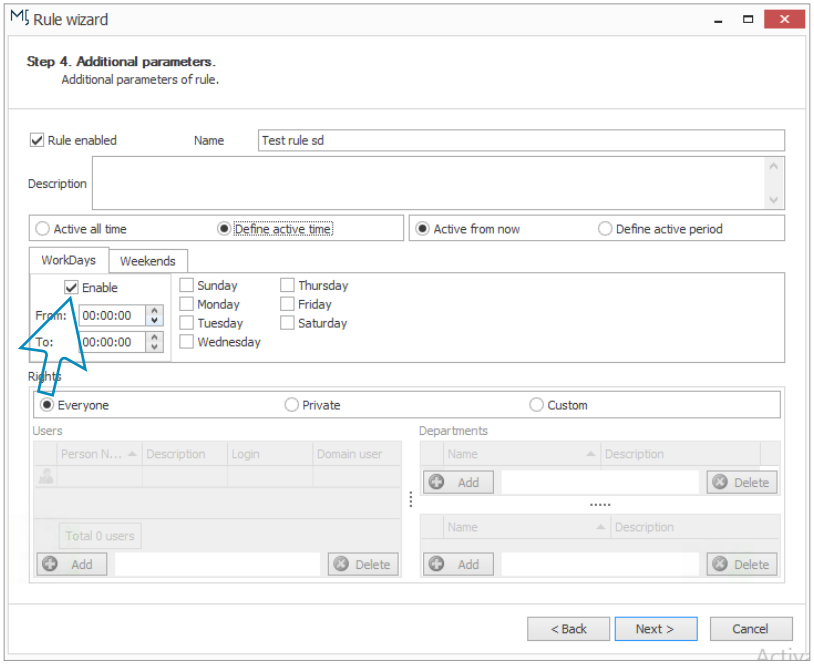
2.2 | *Create rule*



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 seccond 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.

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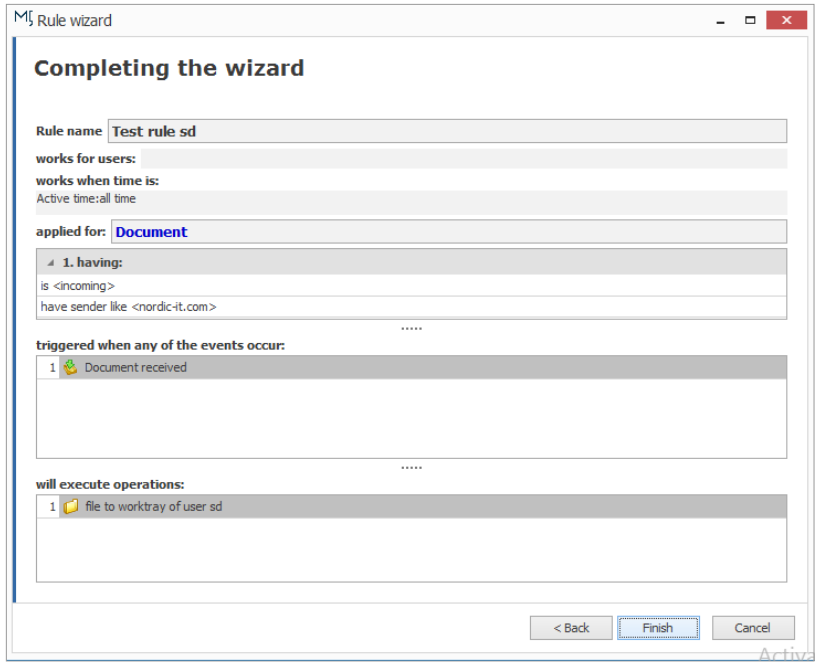
2.2 | *Create rule*

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.



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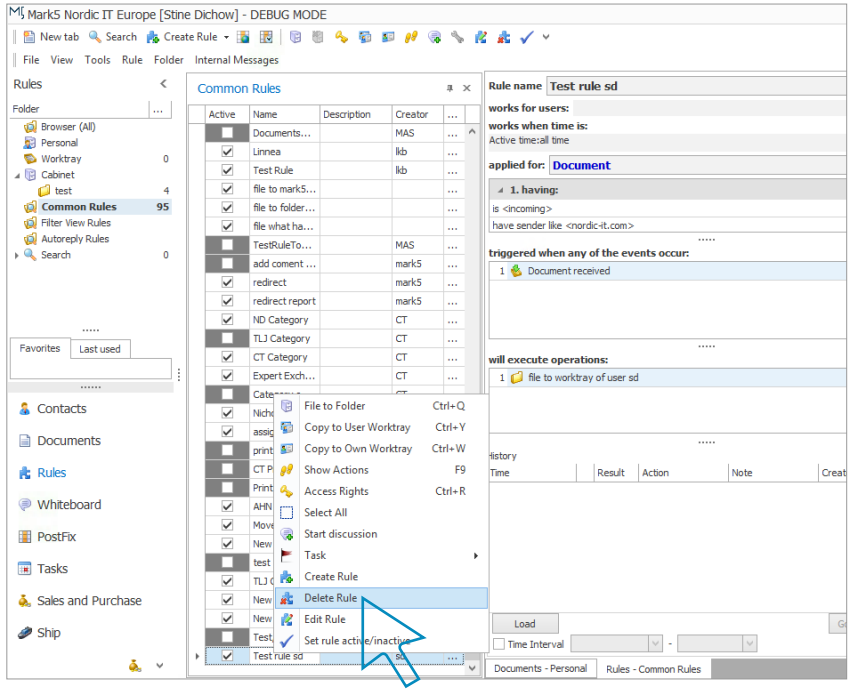
2.3 | *Delete rule*

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.

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