# Outlook Rules for SharePoint Approvers

The rules created in these instructions are client-based rules. This means that the rules will run only if your computer is on and Outlook is open. These instructions are recommended only for those individuals who check their email from a single device.
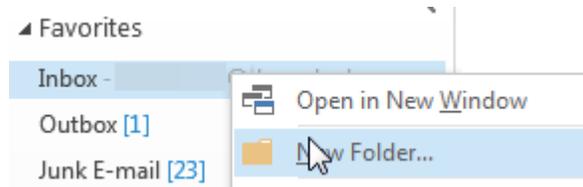
Prepare for the rule.

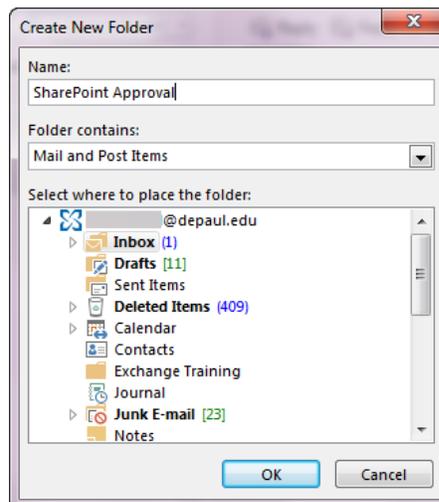1. Open **Outlook** 2010 or Outlook 2013.

2. From the left-hand column, right-click on **your email address**.
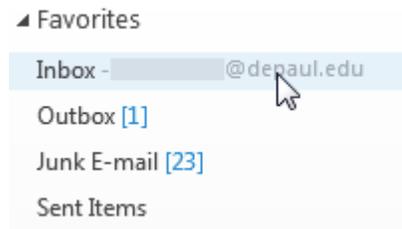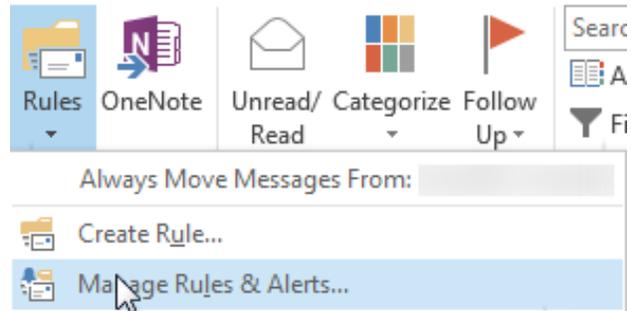
3. Choose **New Folder**.

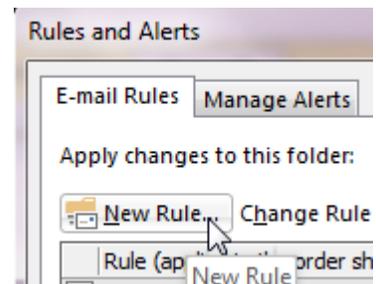4. Enter a name for the folder such as "**SharePoint Approval**."

Create a rule for your approval messages.

This first rule will find and mark all SharePoint approval messages that you are responsible for approving.
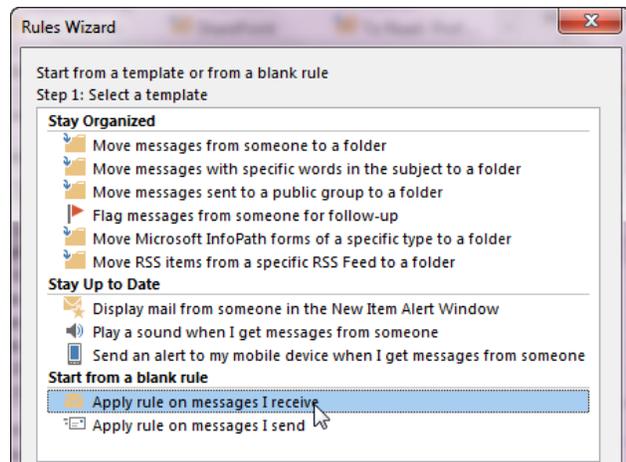
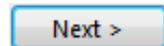5. In the **Home** tab of Outlook, click **Rules**. Select **Manage Rules & Alerts**.

6. Click **New Rule**.

7. Under the section "Step 1: Select a template," choose **Apply rule on messages I receive**.

8. Click **Next**.

9. In the section "Step 1:Select conditions," check the second, thirteenth, and seventeenth items:
   - **with specific words in the subject**
   - **with specific words in the body**
   - **with specific words in the sender's address**

☐ from people or public group
☑ with specific words in the subject
☐ through the specified account
☐ sent only to me
☐ where my name is in the To box
☐ marked as importance
☐ marked as sensitivity
☐ flagged for action
☐ where my name is in the Cc box
☐ where my name is in the To or Cc box
☐ where my name is not in the To box
☐ sent to people or public group
☑ with specific words in the body
☐ with specific words in the subject or body
☐ with specific words in the message header
☐ with specific words in the recipient's address
☑ with specific words in the sender's address
☐ assigned to category category

10. In "Step 2: Edit the rule description (click an underlined value)," click **with specific words in sender's address.**

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with specific words in the sender's address
  and with specific words in the subject
  and with specific words in the body

11. Enter **noreply@depaul.edu.**
    Click **Add**.
    Click **OK**.

Search Text

Specify a word or phrase to search for in the sender's address:

noreply@depaul.edu   [Add]

Search list:

[   ]   [Remove]

                              [OK]   [Cancel]

12. In "Step 2: Edit the rule description (click an underlined value)," click **and with specific words in the subject.**

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with noreply@depaul.edu in the sender's address
  and with specific words in the subject
  and with specific words in the body

13. Type: **Task assigned by**
    Click **Add.**
    Click **OK.**

Search Text

Specify words or phrases to search for in the subject:

task assigned by   [Add]

Search list:

[   ]   [Remove]

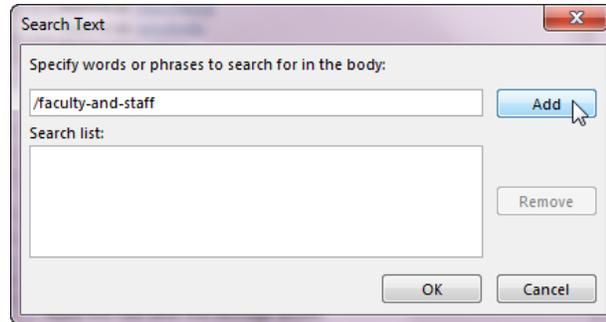   [OK]   [Cancel]

14. In "Step 2: Edit the rule description (click an underlined value)," click **and with specific words in the body.**

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with noreply@depaul.edu in the sender's address
  and with task assigned by in the subject
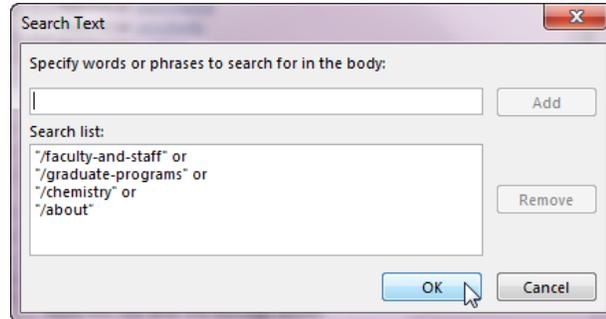 and with specific words in the body

15. Here you will create a list of subsites for which you are responsible. For each subsite, type in the name beginning with a slash. Examples:
    /faculty-and-staff
    /graduate-programs
    /chemistry
    /about

Search Text

Specify words or phrases to search for in the body:

/faculty-and-staff   Add

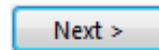Search list:

      Remove

      OK   Cancel

16. Click **Add** after each subsite name to add it to the "Search list."

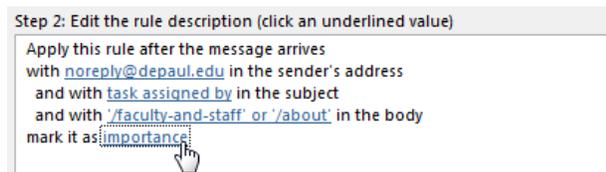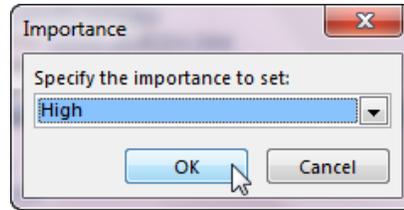   Once the list includes all sites you are responsible for approving, click **OK**.

Search Text

Specify words or phrases to search for in the body:

      Add

Search list:

"/faculty-and-staff" or
"/graduate-programs" or
"/chemistry" or
"/about"

      Remove

      OK   Cancel

17. Click **Next**.

Next >

18. In "Step 1: Select Actions(s)," select the fourteenth option: **mark it as importance**.

What do you want to do with the message?
Step 1: Select action(s)

- [ ] move it to the specified folder
- [ ] assign it to the category category
- [ ] delete it
- [ ] permanently delete it
- [ ] move a copy to the specified folder
- [ ] forward it to people or public group
- [ ] forward it to people or public group as an attachment
- [ ] redirect it to people or public group
- [ ] have server reply using a specific message
- [ ] reply using a specific template
- [ ] flag message for follow up at this time
- [ ] clear the Message Flag
- [ ] clear message's categories
- [x] mark it as importance
- [ ] print it
- [ ] play a sound
- [ ] start application
- [ ] mark it as read

19. Under "Step 2: Edit the rule description (click and underlined value)," **click mark it as importance**.

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with noreply@depaul.edu in the sender's address
  and with task assigned by in the subject
  and with '/faculty-and-staff' or '/about' in the body
mark it as importance

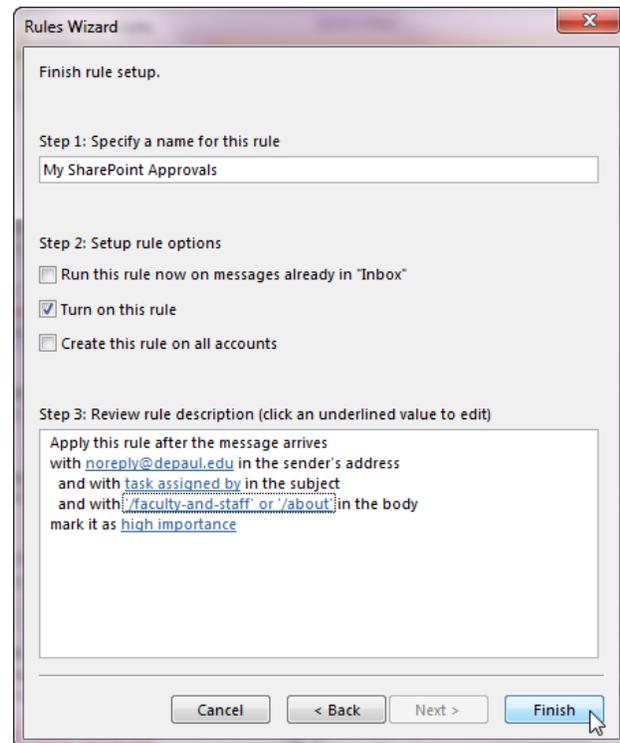20. From the dropdown, select **High**. Click **OK**.

21. Click **Next**.
    Click **Next** again.
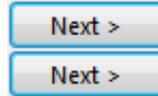
22. Type a name for your rule, such as "**My SharePoint Approvals**."

    Click **Finish**.

23. When prompted with a warning message, click **OK**.
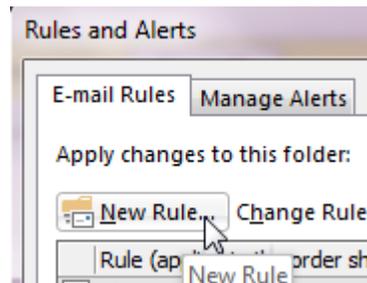
Create a rule for the messages you don't want.

This second rule will clean the approval messages you do not need out of your Inbox. It will find all SharePoint approval messages that were not marked in your first rule and move them to the SharePoint Approval folder you created.
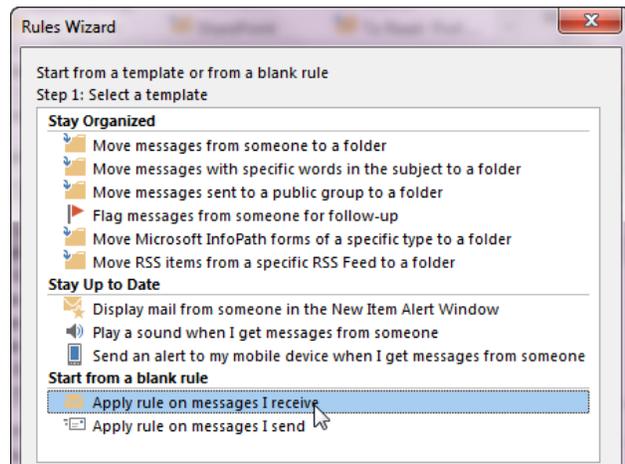
24. In the **Home** tab of Outlook, click **Rules**. Select **Manage Rules & Alerts**.
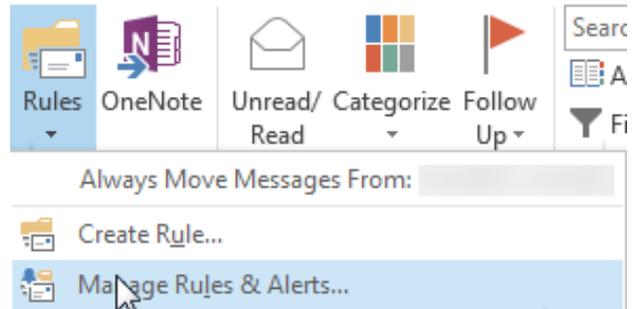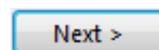

25. Click **New Rule**.

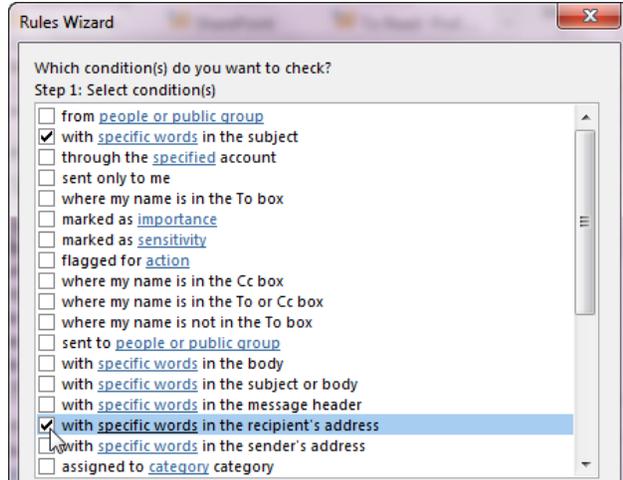26. Under the section "Step 1: Select a template," choose **Apply rule on messages I receive**.
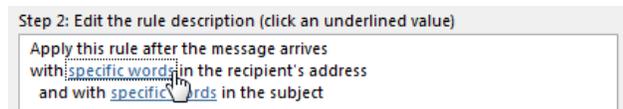

27. Click **Next**.

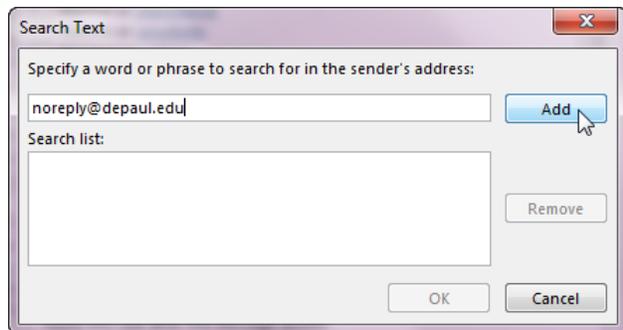28. In the section "Step 1:Select conditions," check the second and seventeenth items:
    - **with specific words in the subject**
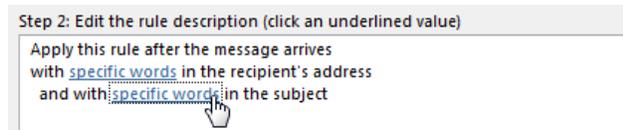   - **with specific words in the sender's address**

29. Under "Step 2: Edit the rule description (click an underlined value)," click **with specific words in the recipient's address**.
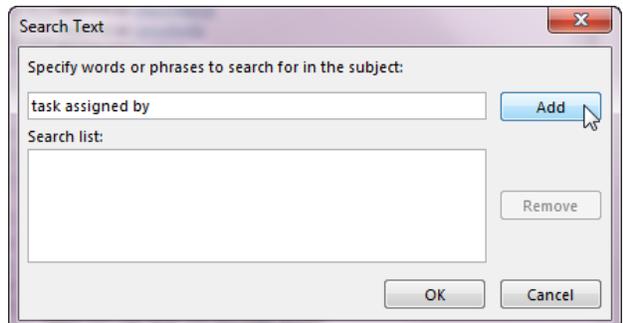
30. Enter **noreply@depaul.edu.**
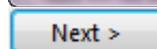   Click **Add**.
    Click **OK**.

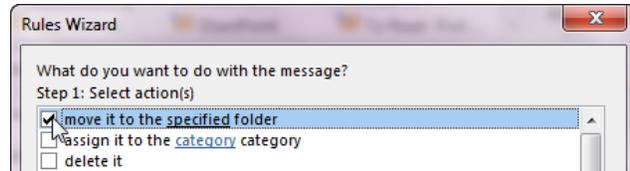31. In "Step 2: Edit the rule description (click an underlined value)," click **and with specific words in the subject.**

32. Type: **Task assigned by**
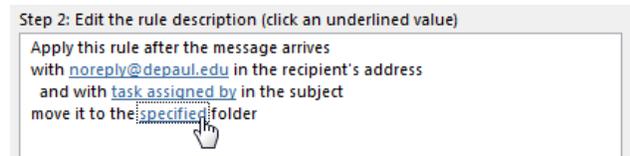   Click **Add.**
    Click **OK.**

33. Click **Next**.

34. In "Step 1: Select Actions(s)," choose the first item: **move it to the specified folder**.

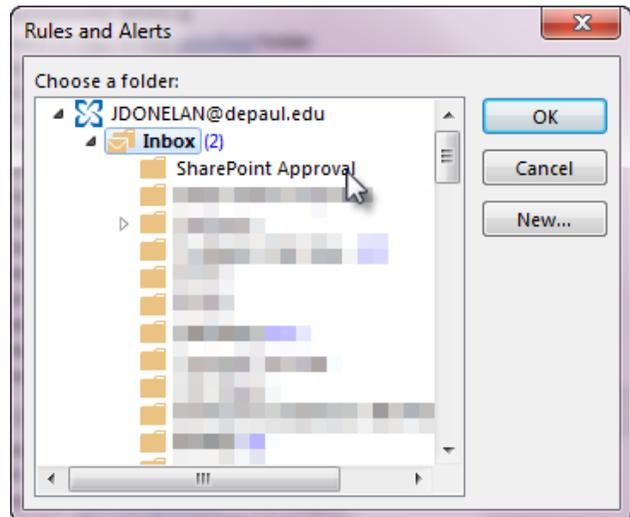35. In "Step 2: Edit the rule description (click an underlined value)," click **move it to the specified folder**.
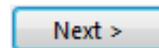
36. In the popup window, select the folder you created in steps 3 & 4.

    Note: If at first you don't see the folder, you may need to click to expand the Inbox.
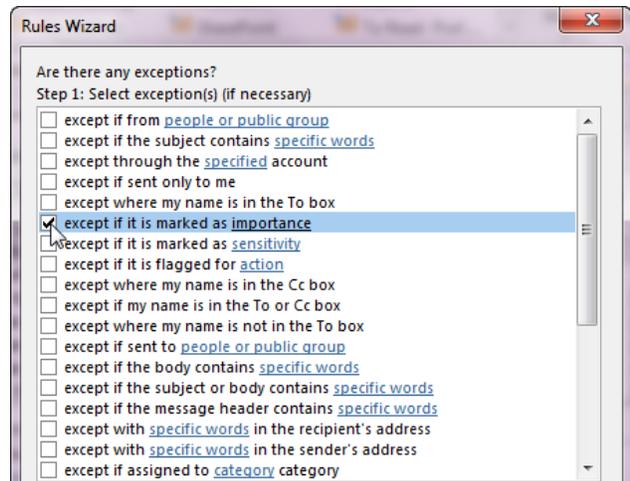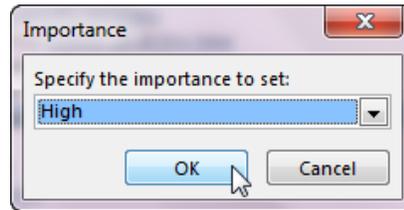
    Click **OK**.

37. Click **Next**.

38. In "Step 1: Select exception(s) (if necessary)," choose the sixth item: **Except if marked as importance**.
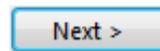
39. In "Step 2: Edit the rule description (click an underlined value)," click

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with noreply@depaul.edu in the recipient's address
and with task assigned by in the subject
move it to the SharePoint Approval folder
except if it is marked as importance

40. From the dropdown, select **High**. Click **OK**.

Importance

Specify the importance to set:

High

OK   Cancel

41. Click **Next.**

Next >

42. Give the rule a name, such as "**Move Others' SharePoint Approvals**."

Click **Finish**.

Click **OK**.

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Move Others' SharePoint Approvals

Step 2: Setup rule options

☐ Run this rule now on messages already in "Inbox"

☑ Turn on this rule

☐ Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
with noreply@depaul.edu in the recipient's address
and with task assigned by in the subject
move it to the SharePoint Approval folder
except if it is marked as high importance

Cancel   < Back   Next >   Finish