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.


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

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

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

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

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

14. In "Step 2: Edit the rule description (click an underlined value),” click 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

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**.

17. Click **Next**.

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

19. Under “Step 2: Edit the rule description (click and underlined value),” **click 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.


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

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

41. Click Next.

42. Give the rule a name, such as “Move Others’ SharePoint Approvals.” Click Finish.

Click OK.