

## Appendix A: Use an Outlook Rule to Manage Recruiting Solutions E-mail to Approver

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### Discussion

Per Microsoft Help, a rule is an action that Microsoft Office Outlook takes automatically on an arriving or sent message that meets the conditions that are specified in the rule. The Rules and Alerts Wizard is used to choose conditions and actions. Rules do not operate on messages that have been read, only on those that are unread.

Recruiting Solutions automatically generates e-mail as a part of its workflow system. These e-mails notify individuals of the tasks that they need to perform, such as an approval or review, and of the status of a job or application.

To manage these numerous e-mails, it is suggested that a folder may be created in Outlook into which these e-mails are delivered, based on an Outlook rule.

The steps shown here use the example of creating a folder that will receive all e-mail messages with the text “approval is requested” or “approval is required” in the subject. When this rule is created, e-mail with that text in the subject is delivered to the folder indicated. This mail is not delivered to the Inbox. The mail that follows the rule is delivered to the folder indicated in the rule.



The automatically generated e-mails in Recruiting Solutions are a system function. It is an all or nothing function, i.e. either e-mail is generated for all people, who are involved, or e-mail is not generated for anyone. **We cannot turn off automatically generated e-mail for an individual.**

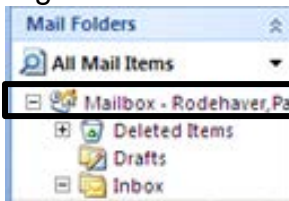
## Outlook 2007

To deliver incoming mail from the Recruiting Solutions system to a particular folder in Outlook:

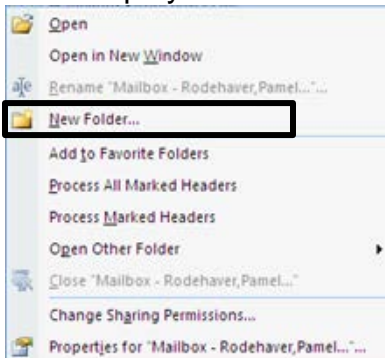
- Create a folder to receive the mail.
- Create a Rule to direct the mail to that folder.

### Create a Folder

1. Right click on Mailbox-(your name).



A list displays.



2. Select New Folder.

The Create New Folder dialog box displays.



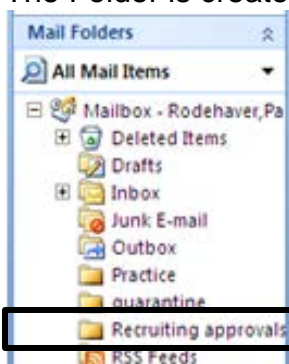
3. Verify that Mailbox-(your name) is selected.

4. In the Name box, enter a name for the folder to hold your Recruiting Solutions approval requests.

In this example, Recruiting approvals is entered.



5. Click on OK.  
The Folder is created and displays in the list of folders.

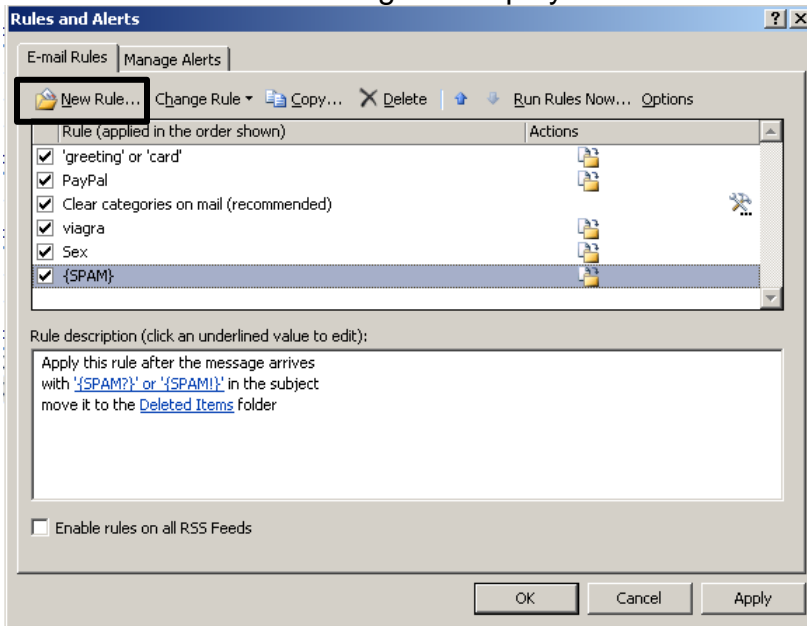


Note: The folder is created, so that it is accessible through Outlook and Outlook Web Access.

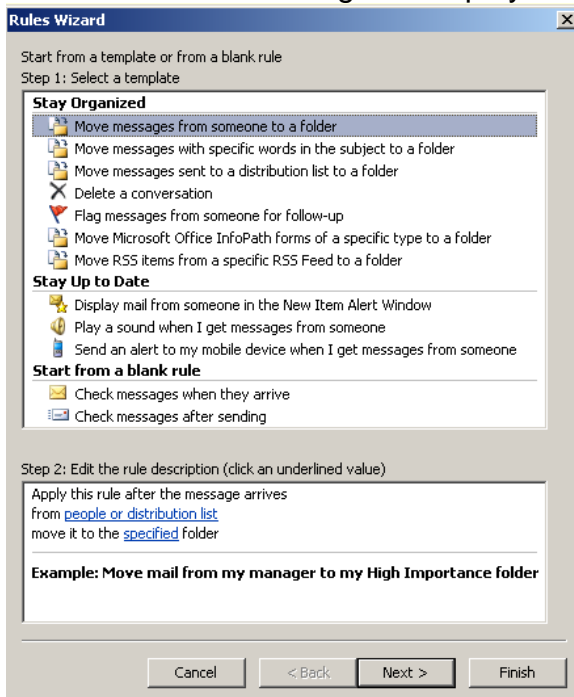
To create personal folders, to store reviewed mail, is a different process. See the documentation at <http://www.uakron.edu/training> on the Faculty/Staff tab or contact the Support Desk at x6888.

**Create a Rule**

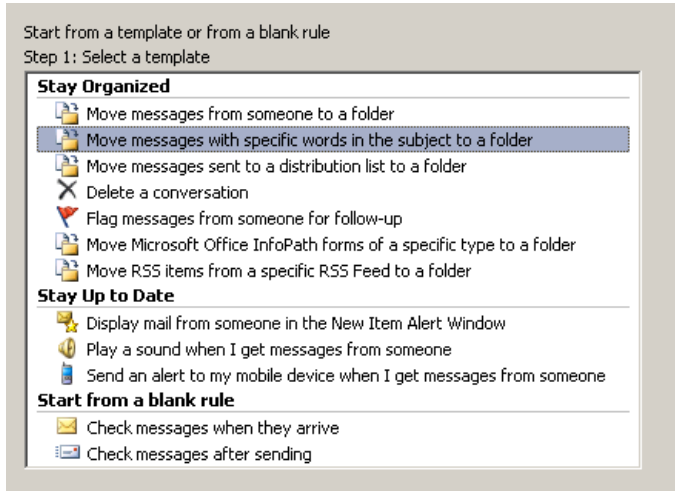
1. From the menu select **Tools > Rules and Alerts**.  
The Rules and Alerts dialog box displays.



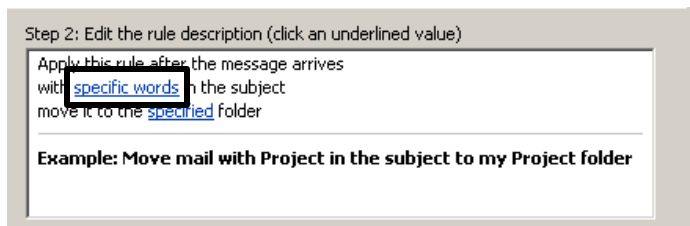
2. Click on the button for **New Rule**.  
The Rules Wizard dialog box displays.



3. In Step 1 (top frame), select the rule template to use.  
 In this example, select **Move messages with specific words in the subject to a folder**.

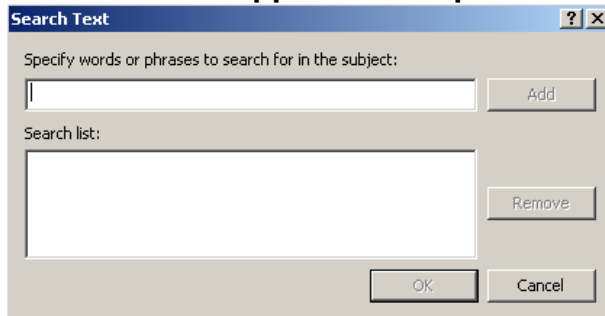


4. In Step 2 (bottom frame), click on the specific words link.

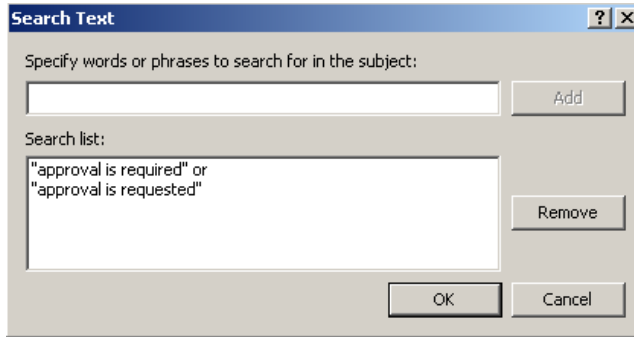


The Search Text dialog box displays.

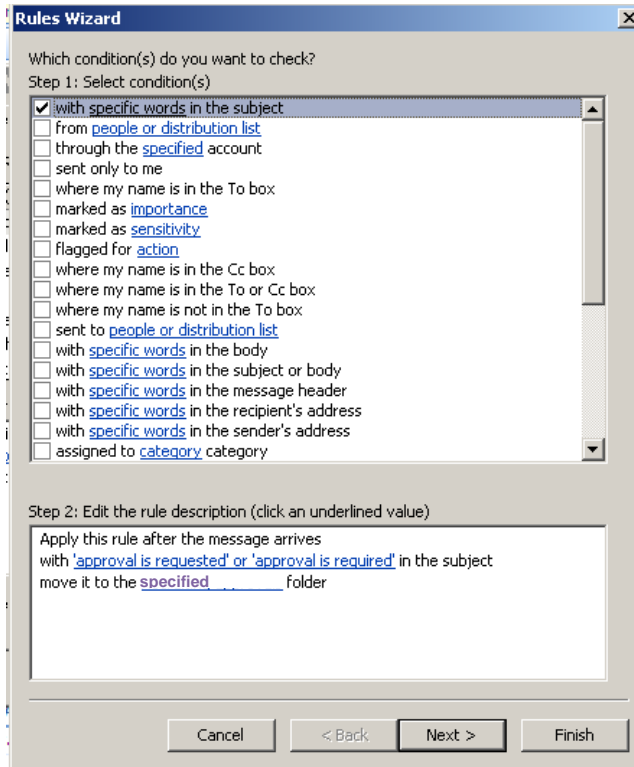
5. Enter the words **approval is requested** and click on the Add button.



6. Enter the words **approval is required** and click on the Add button.

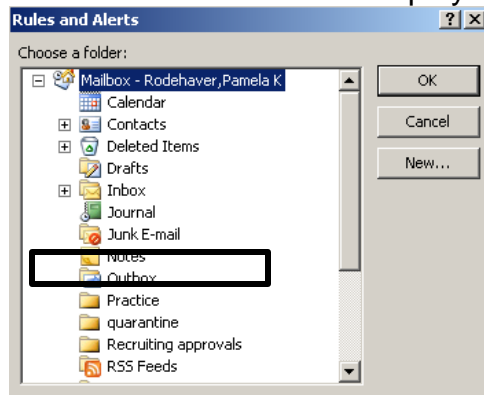


7. When finished adding words, click on the **OK** button. The Rules Wizard dialog box displays.



- In the Rules Wizard dialog box, click on the specified link in the step 2 frame to select a folder.

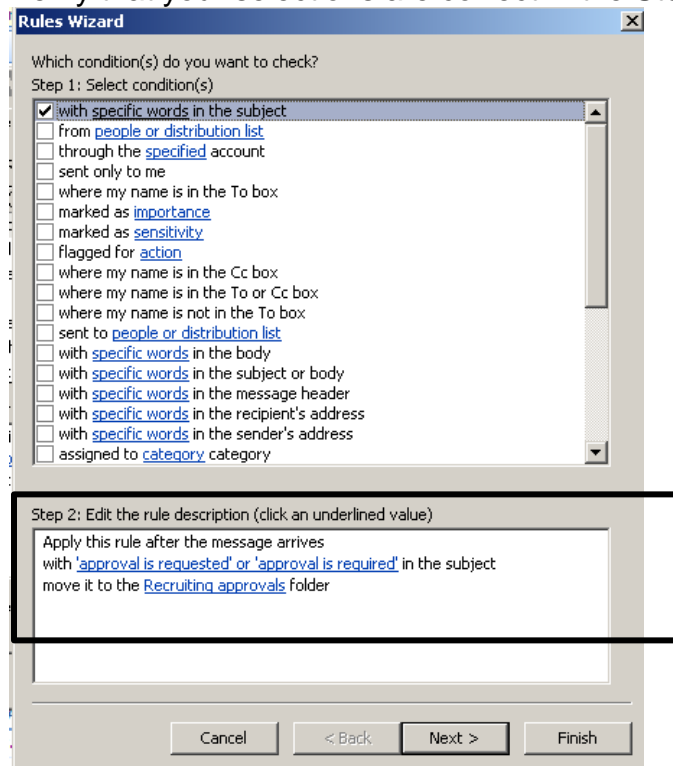
The Choose a Folder list displays.



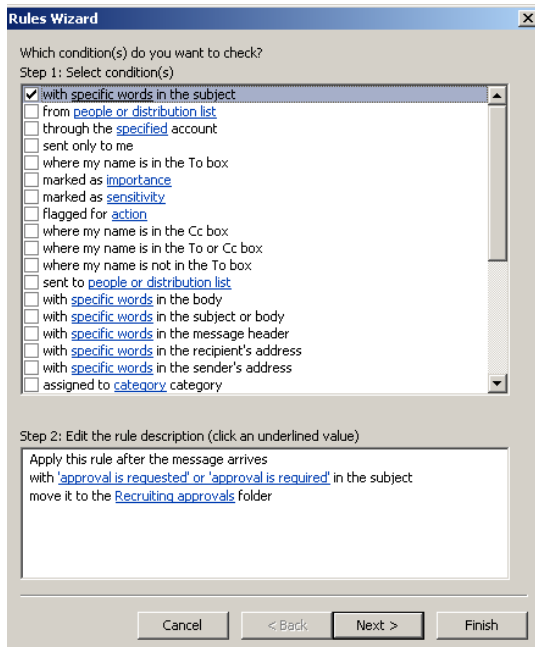
- Click on the folder where to deliver the messages with these word(s) in the subject.  
In this example, the folder Recruiting approvals is selected.

- Click on the **OK** button.

- The Rules Wizard displays again. Verify that your selections are correct in the Step 2 frame.

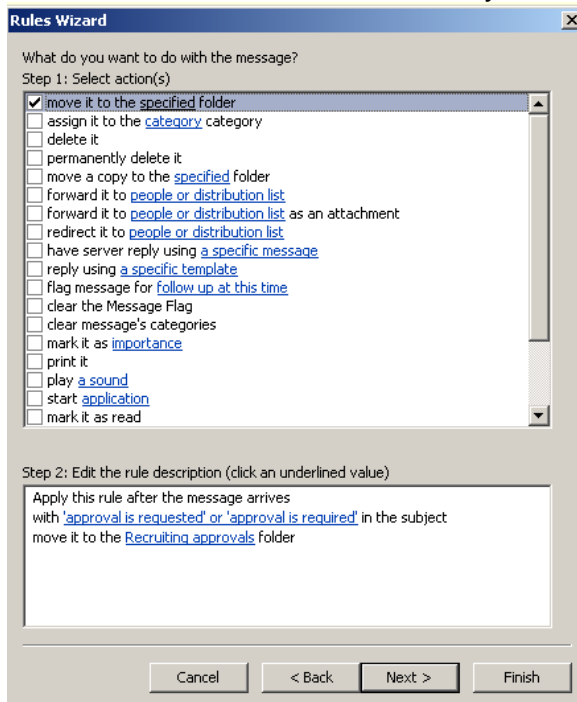


12. Click on the **Next** button.  
The Rules Wizard asks “Which conditions do you want to check?”



Although no further selection is necessary here, you may want to check the box for where my name is in the To box –OR- the box for where my name is in the To or Cc box.

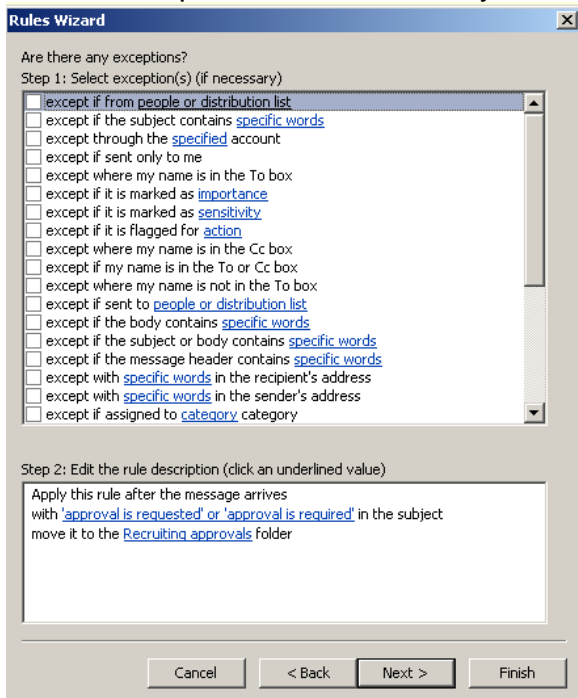
13. Click on the **Next** button.  
The Rules Wizard asks “What do you want to do with the message?”



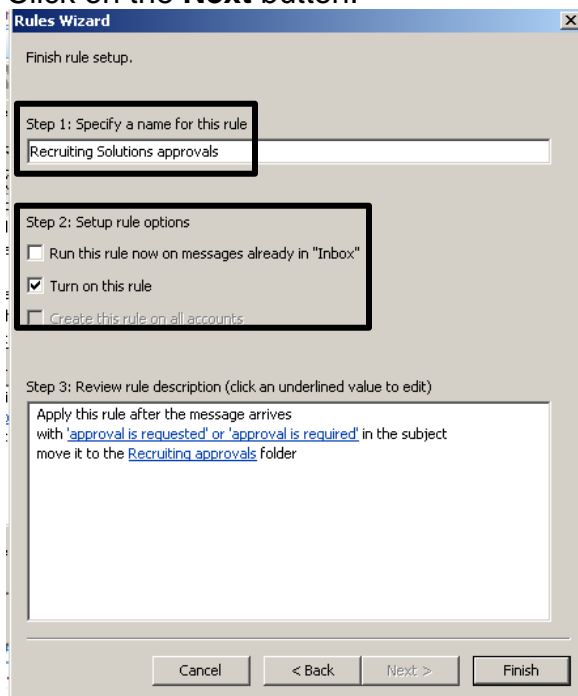
Verify that the box is marked for **move it to the specified folder**.



14. Click on the **Next** button.  
 The Rules Wizard asks “Are there any exceptions?”  
 In this example, it is not necessary to select anything here.

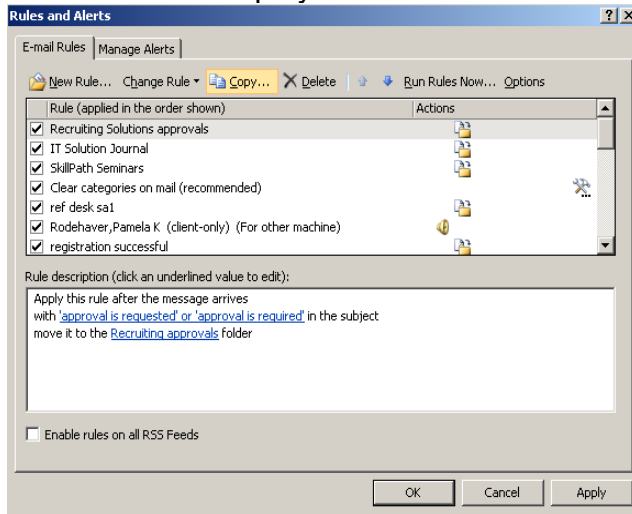


15. Click on the **Next** button.



- In Step 1, enter a name for the rule. Example: Recruiting Solutions approvals
- In Step 2, verify that the box is marked for **Turn on the rule**.

16. Click on the **Finish** button.  
 The Rule now displays in the Rules and Alerts dialog box.



17. Click on the **Apply** button.

18. Click on **OK**.  
 The dialog box closes.



**Remember to review the mail in this folder, just as you review the mail in your Inbox folder.**