

Filtering ePro Approval Emails Out of Your Inbox

Outlook rules let you automatically send incoming messages to a folder. For example, you can create a rule to move ePro request-for-approval emails to a folder as soon as they arrive in your Inbox.

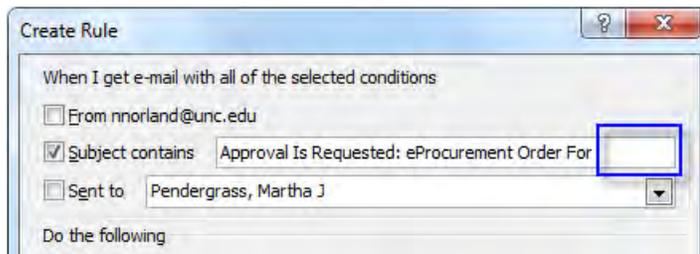
There are two steps to the process:

- 1) Create the rule from an existing ePro message
- 2) Test the rule to make sure it is set up correctly

Creating a rule from a message

Follow these steps to set up a rule that sends ePro request-for-approval emails to a folder. This rule does not move ePro emails that have been someone has replied to you on or that have been forwarded to you:

1. In Outlook, create the folder you want to move messages to as they come in.
2. In your Inbox, right-click the message you want to base the rule on (for example, a request for approval email from ePro), and then click **Create Rule** on the shortcut menu.
3. In the **Create Rule** dialog box, do the following:
 - a) Select the "Subject contains" option.
 - b) In the text in the white box beside the words, "Subject contains," delete the text in quotes at the end of the line:

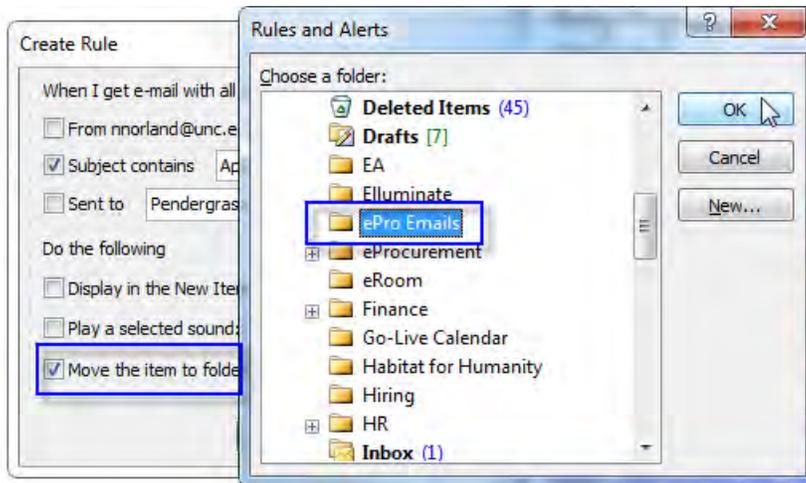


- c) Select the Move the item to a folder option.

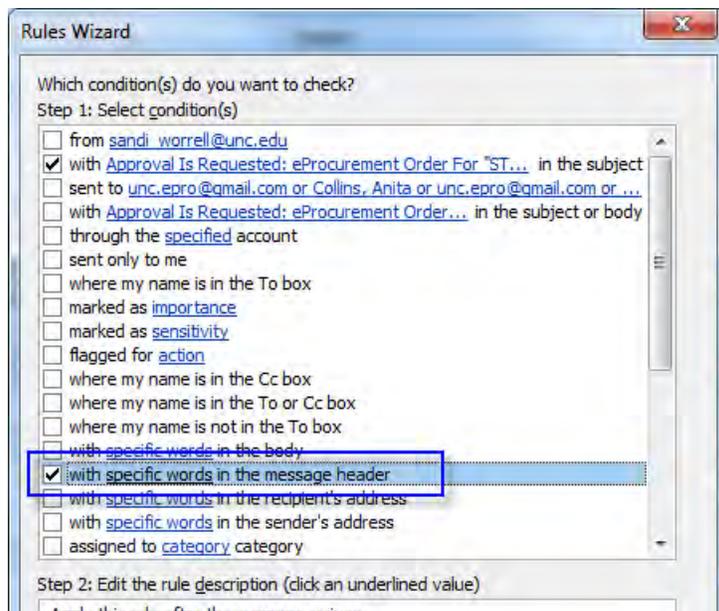
Result: Outlook displays a window to let you choose a folder.

- d) Click the folder you want to move ePro emails to and click **OK**:

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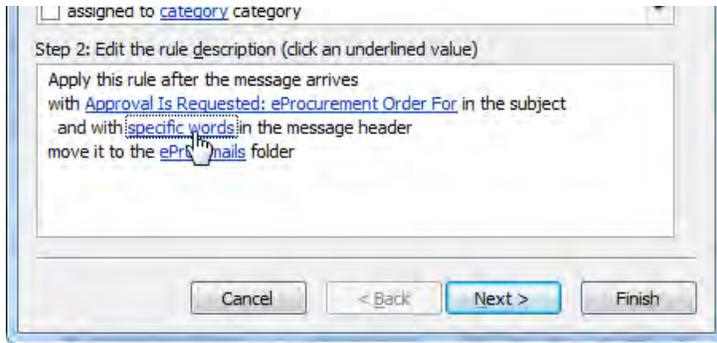
4. Click the **Advanced Options** button.
5. Leave the options selected that already have a checkmark beside them, and select the **with specific words in the message header** option:



Result: Outlook adds a sentence in the white box at the bottom of the dialog box.

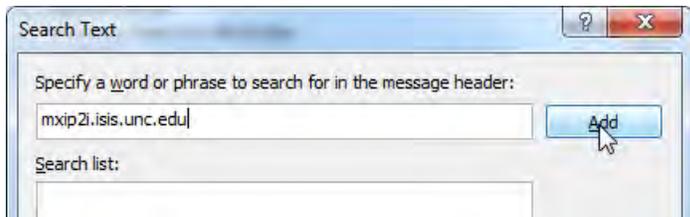
6. In the box at the bottom of the dialog box, click the blue “specific words” link:

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Result: Outlook displays a new window titled, "Search Text."

7. Type the following in the box at the top and click **Add**:
mxip2i.isis.unc.edu

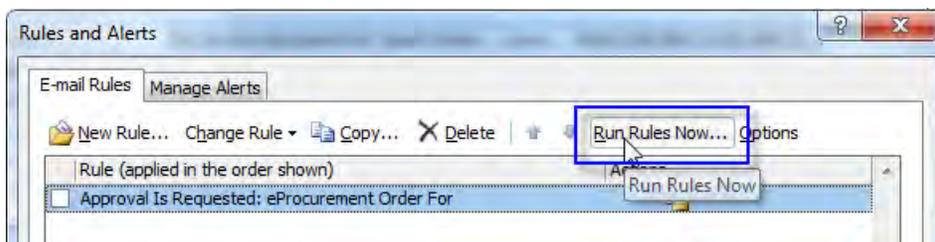


Result: Outlook adds the text you typed in the Search list box at the bottom of dialog box.

8. Click **OK**.
9. Click **Finish**.

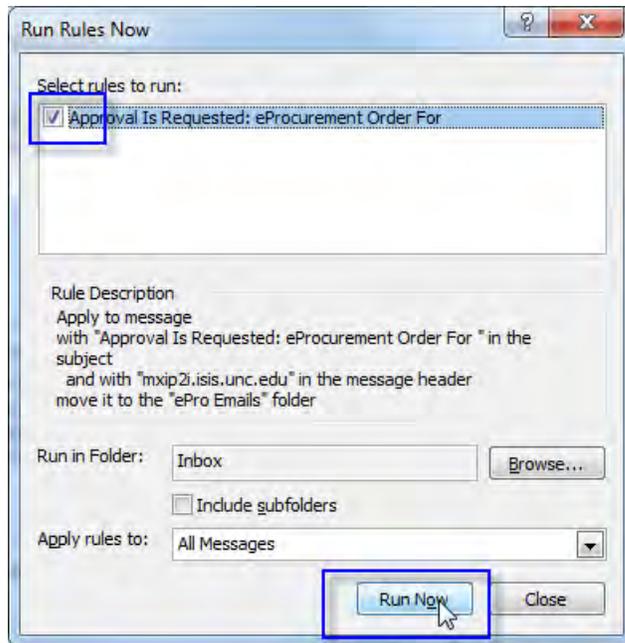
Testing the Rule You Created

1. In your Outlook Inbox, click **Tools**, and then **Rules and Alerts**.
2. Click the **Run Rules Now** button:



3. Put a checkmark beside the rule that starts with "Approval Is Requested" and click Run Now:

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Result: If you have a lot of messages in your Inbox, Outlook shows a progress bar as it checks for ePro messages.

4. Click **Close** and then **OK**.
5. Check the folder you are sending ePro messages to to make sure that the ePro messages in your Inbox were moved there correctly.

Results:

- Once the rule is set up correctly, future ePro request-for-approval emails will be sent to the folder you specified as soon as they reach your Inbox.
- ePro emails that have been forwarded to you or that someone has replied to you about will be left in your Inbox.