

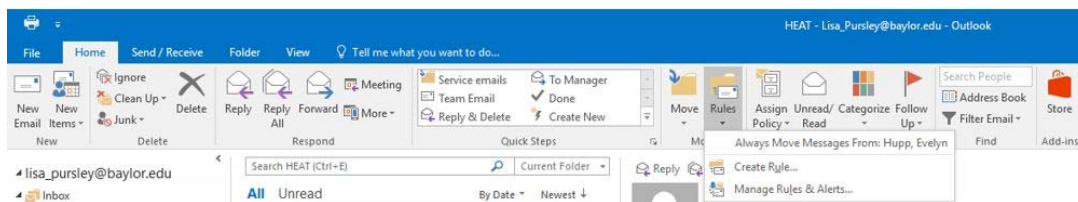


Creating a Rule by Subject or Keyword (Outlook 2013-2016)

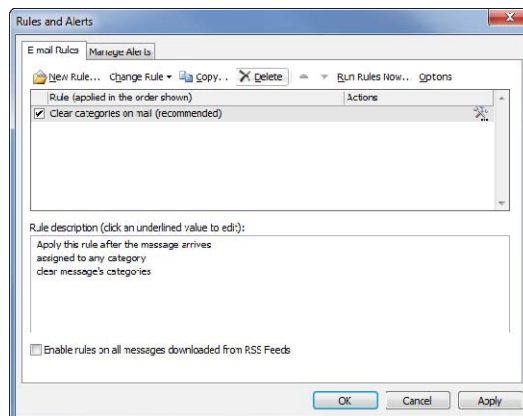
These instructions will tell you how to create a rule in Outlook that automatically moves incoming messages with certain words in the subject into another folder within Outlook. These messages will go directly into the specified folder rather than into your Inbox.

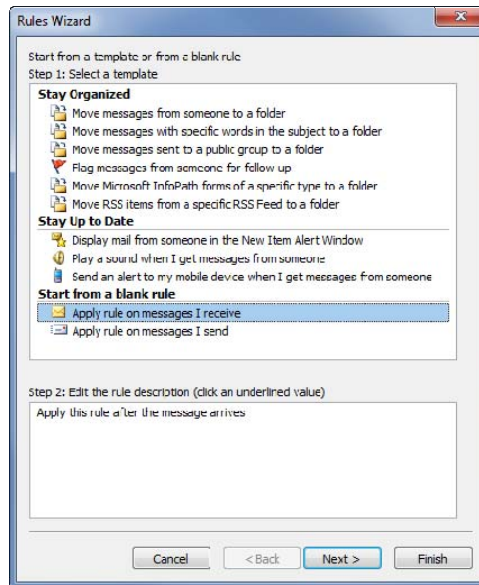
NOTE: If you have not already done so, you may want to create a new folder for the messages to deliver to before you begin this procedure.

1. Make sure you are on the Home tab, then click on the Rules button, and choose “Manage Rules and Alerts” from the drop-down menu. Now click on the “New Rule” button at the top of the window.



2. In the “Start from a blank rule” section, choose “Apply rule on messages I receive”. Click Next.

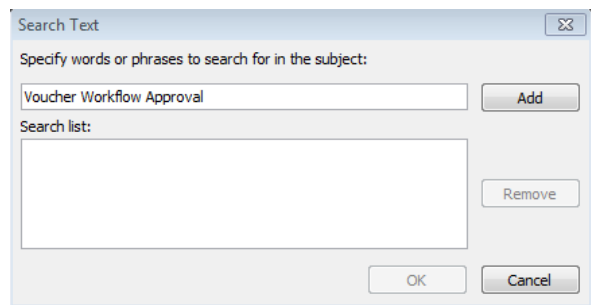
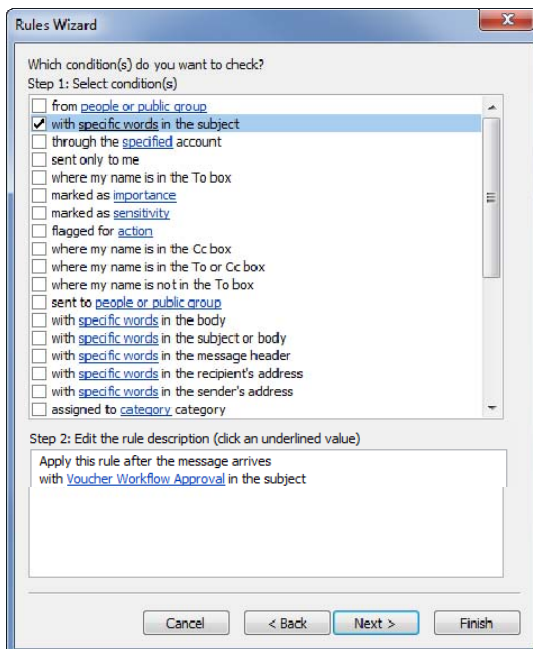




3. Place a check mark in the condition that states, “with specific words in the subject.” In the bottom portion of the window, click on the blue underlined “specific words” link. Next, type in the words or phrases that you want the rule to search for in the subject. TRAX voucher workflow approval emails will always contain the following words in the subject line:

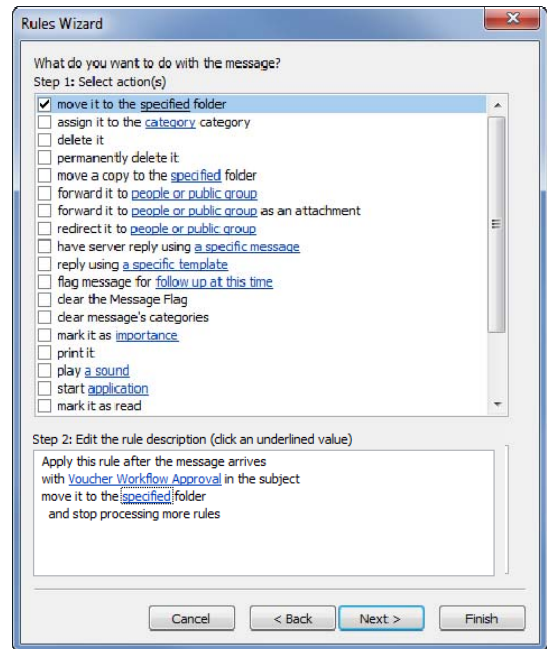
Voucher Workflow Approval in TRAX is requested for Voucher ID

Click the Add button when you’re done. Click OK, then Click the Next button.

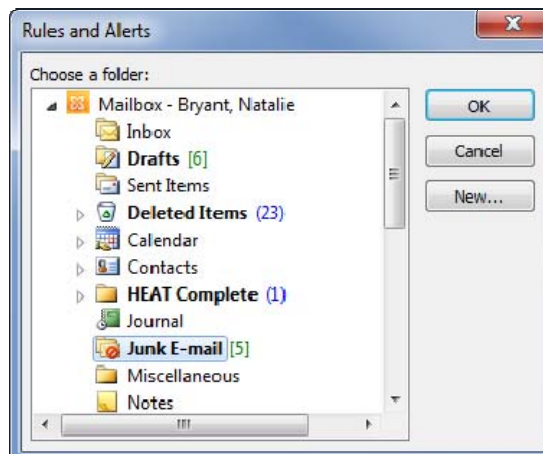




4. Now, you will decide where you want these messages to go, once it has been determined that the subjects contain your specified text. Put a check mark next to “move it to the specified folder”. And, at the bottom of the window, click on the blue underlined “specified” link. Here you will choose which folder you’d like to move the emails into. After you’ve made your selection, click OK. Then, click Next.

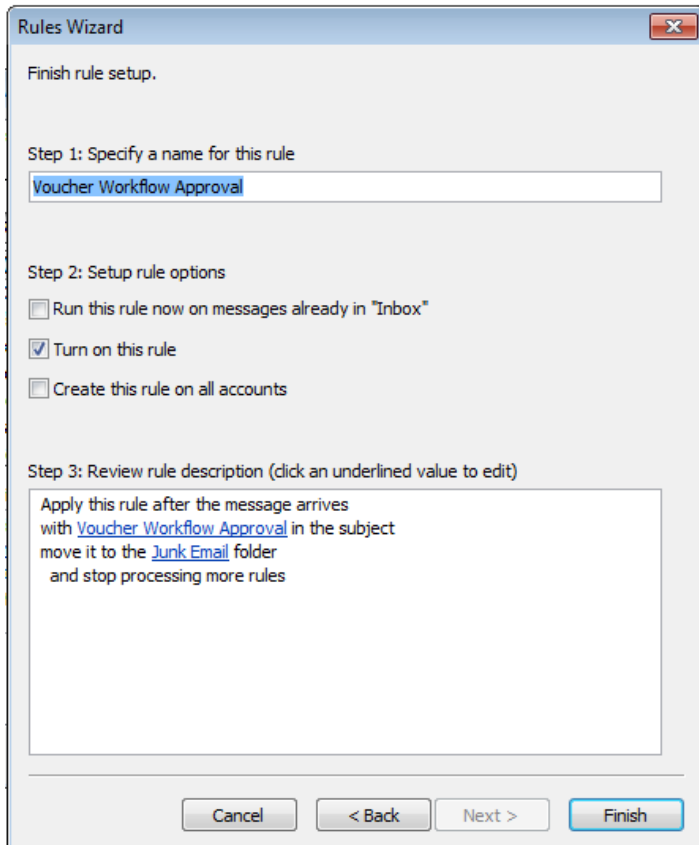
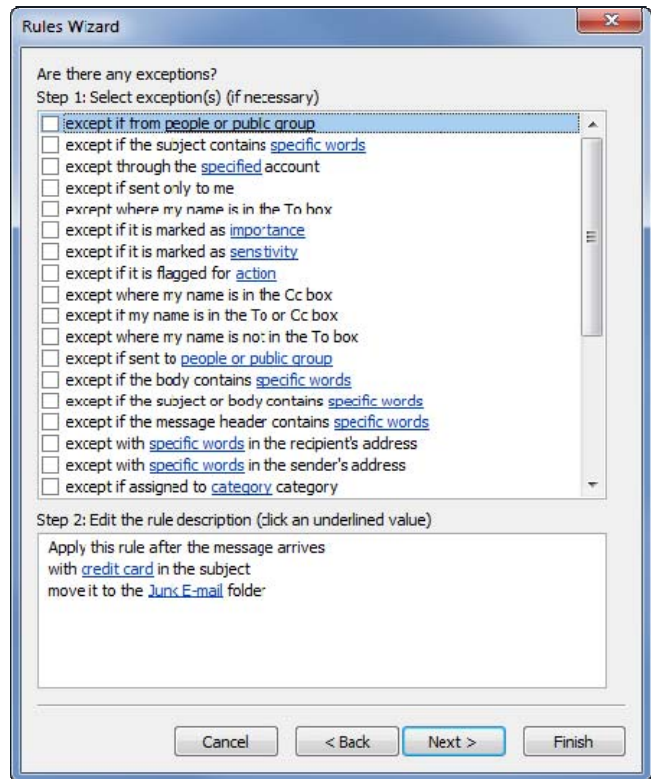


5. **NOTE:** Our example chose the junk mail folder. You of course will not choose this folder if you are choosing to move legitimate email to a filed mail folder. Please choose the folder you created for the purpose of automatically filing email messages.





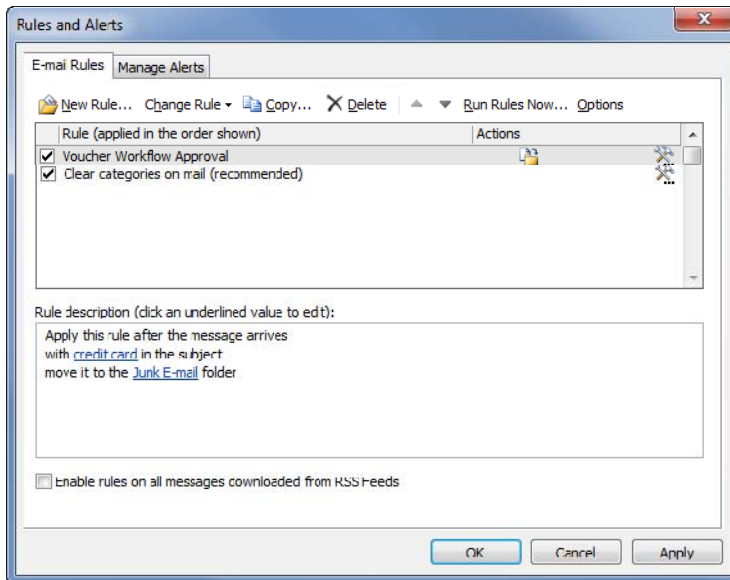
6. **OPTIONAL**- Now you may place a check mark for exceptions (if there are any desired). Click Next.



7. Here you can name or rename the rule to fit your criteria, if desired. Click Finish.



PeopleSoft Financials Version 9.2



Now the Rules Wizard will appear with your new rule listed. Click OK when finished.

If you have any further questions please contact TRAX Support at 254.710.8704 or the Help Desk at 254.710.4357