

## Quick Sheet – Setting up Email Filters for TEM/Workflow Notifications

This guide will show you how to filter the TEM email notifications that are sent to your Western email address. While this guide is specifically for the Microsoft Outlook desktop client, content in each notification (identified later) used to separate one type of notification from another can be translated to other email clients as well. If you need help or clarification on any of the steps below, or help setting up more complex filters than the one outlined below, please don't hesitate to contact Samantha or Sharon at:

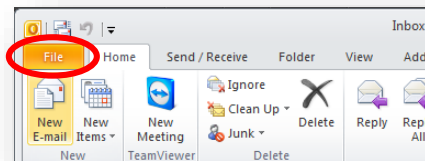
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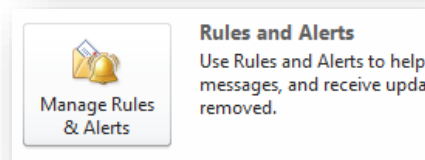
The example below is for creating a single, basic filter that will put all Workflow notifications into a target folder. It will filter these email using a combination of the sender (Travel Services) and text included in subject line of each email notification ("Travel & Expense Document" or "Travel and Expense Document").

### Getting to the Rules & Alerts Screen in Outlook

- 1) Open Outlook and look for the **File** tab in the upper-left corner of the screen. Click on the **File** tab to open it.



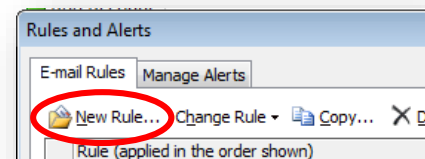
- 2) Once you've opened the **File** tab, look for a button that says **Manage Rules & Alerts**. It should be at the bottom of the Account Information section. Click that button.



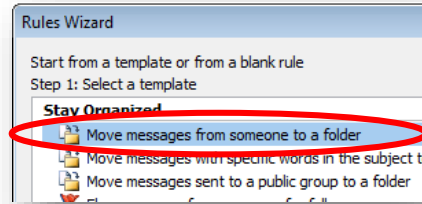
- 3) Clicking that button will open **the Rules and Alerts** screen.

### Creating the Email Rule from the Rules and Alerts Screen

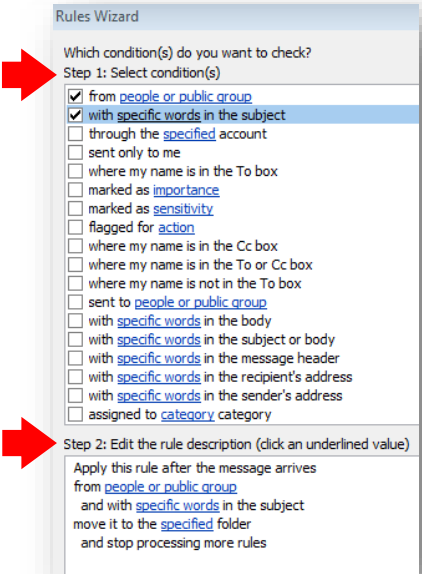
- 4) When you have the **Rules and Alerts** screen open, click the **New Rule** button to bring up the **Rules Wizard**.



5) When the **Rules Wizard** opens, make sure the **“Move message from someone to a folder”** template is selected. Once it is, click the **next** button on the bottom of the wizard.



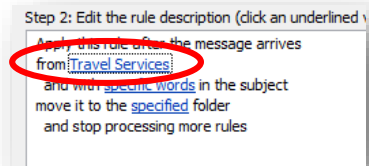
6) On the next screen, first make sure the top two boxes are checked under Step 1. They should be for **“from people or public group”** and **“with specific words in the subject”**.



7) When you select those boxes, you’ll notice that the rule description under Step 2 will change. Blue, underlined sections will be added that correspond to the criteria you want your filter to use. The rules we are creating have three criteria:

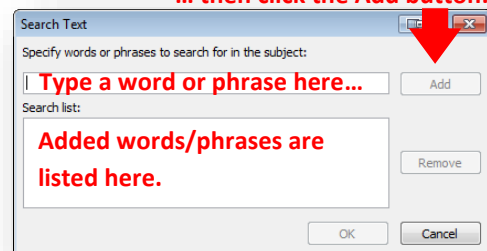
1. “people or public group” -> who the emails you want to filter are from
2. “specific words” -> that’s in the subject line of the emails you want to filter
3. “specified folder” -> the folder you want to filter these emails into

8) Under Step 2, click on **people or public group**, select **Travel Services** from the Outlook address book, and click OK. Your rule description under Step 2 should now list **Travel Services**.

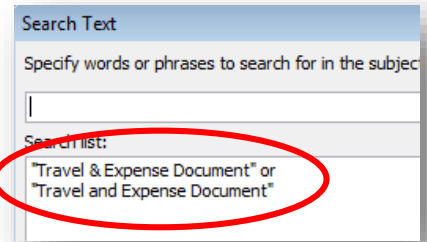


9) Next, under Step 2, click on **specific words**. This will bring up the screen pictured to the right, which you use to add specific words or phrases that appear in the subject line of the emails you want to filter out using this rule. Keep in mind that words/phrases you add on this screen are case sensitive.

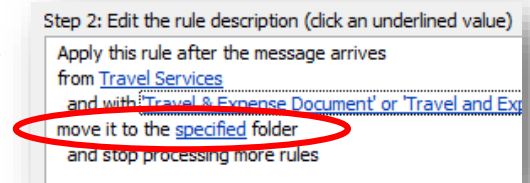
... then click the **Add** button.



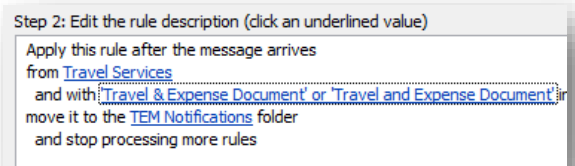
10) Add the following, bolded phrases as two separate items:  
**Travel & Expense Document** and  
**Travel and Expense Document**. Your added items should appear as they do in the picture to the right. Click **OK** when finished.



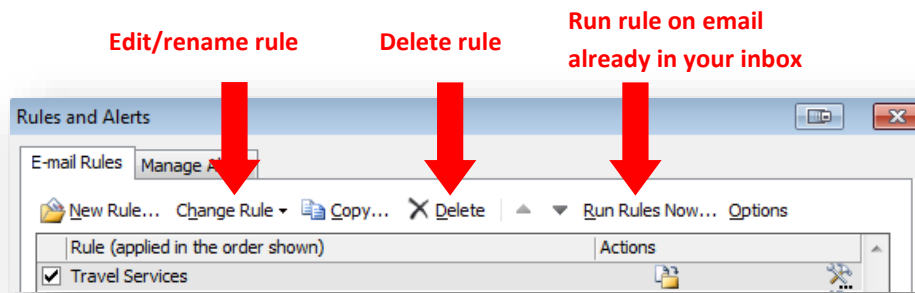
11) Finally, under Step 2, click on **specified folder**. Either select an existing folder to filter these emails into or create a new folder specifically for these email notifications. Click **OK** when finished.



12) Your rule description under Step 2 should now look like the image to the right. Click **Finish** to create the rule.



13) Finally, click **Apply** at the bottom of the **Rules and Alerts** screen, and you're done! This rule will now be used for any incoming email that matches the criteria you setup. You can edit, delete, or manually run the rule from the **Rules and Alerts** screen at any time.



Again, if you need clarification on anything you've read here, or help setting up more complex filters than the one outlined in this quick sheet, please don't hesitate to contact Samantha or Sharon at:

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