

# iProcurement: Managing e-mails

The iProcurement system generates a lot of emails providing you with information about the status of your requisitions and prompting you when action is necessary from you regarding an order (e.g. to approve or receipt a requisition).

For heavy iProcurement users, these emails can start to overwhelm you email Inbox, so you may find it useful to setup rules in your email system to move CUFS emails to a specific folder.

This document guides you on how to setup mail filtering rules in Microsoft Outlook. Links to generic guides for other email systems are provided at the end.

# Creating a folder for the iProc emails

- 1. In Outlook, make sure you have your email pane selected
- 2. The first step is to create the folder for the CUFS emails to move to.

**Right click** on your *Inbox,* select **New Folder** and enter a suitable name for the folder e.g. iProc Emails.





3. Click **OK** and the new folder will be listed under your inbox folder.



# **Creating the rules**

4. From the Office Ribbon, select **Rules** and **Manage Rules and Alerts...** 



5. The *Rules and Alerts* screen displays, click New Rule.

Rules and Aler	ts				1
E-mail Rules	Manage Alerts				
Apply changes to this <u>f</u> older: Inbox [ @admin.ca					am.ac.uk]
<del>়</del> <u>N</u> ew Rul	e C <u>h</u> ange Rule		🗙 <u>D</u> elete	• •	Run Rule
Rule (applied in the order shown)					Actions
Select the "New Rule" button to make a rule.					

6. The *Rules Wizard* pop up window is where the type of rule is created.



## Move messages from someone to a folder

Rules Wizard Start from a template or from a blank rule Step 1: Select a template	× 7. Ensure that the relevant rule is highlighted
Stay Organized         Move messages from someone to a folder         Move messages with specific words in the subject to a folder         Move messages sent to a public group to a folder         Flag messages from someone for follow-up         Move RSS items from a specific RSS Feed to a folder         Stay Up to Date         Display mail from someone in the New Item Alert Window         Play a sound when I get messages from someone         Send an alert to my mobile device when I get messages from someone	
Send an alert to my mobile device when I get messages from some Start from a blank rule Apply rule on messages I receive Cartering Apply rule on messages I send Step 2: Edit the rule description (click an underlined value)	
Apply this rule after the message arrives         from people or public group         move it to the specified folder         and stop processing more rules         Example: Move mail from my manager to my High Importance folder         Cancel       < Back	8. Click on <b>people or public</b> <b>group</b> link, and the address book will display. All iProcurement related emails come from UFS_Notifications@admin.cam.ac.uk Enter this in the <b>From</b> box and click <b>OK</b>

9. Click on the **Specified** link to input which folder the message is to go too. A list of your folders will display (you may have to expand some of these), scroll down till you find the folder created in step 3 and click **OK**.

- 10. Click **Next** as this is where we specify what conditions need to be checked. In this scenario the tick will have populated for *from people or public group*.
- 11. Click **Next**, this is where we specify what to do with the message, and the relevant actions will default with a tick.
- 12. Click **Next** to display the *Exceptions* screen. It is important that email notifications which require an action from you <u>do not move</u> to the new folder, these are commonly:
  - a. Requisitions that have been rejected
  - b. Requisition that needs actioning (if you are an approver of other colleagues requisitions)

#### Tick the box except if the subject contains specific words.

In the bottom part of the screen click on *specific words* and enter **Rejected**, click **Add**, enter **Action Required**, click **Add**, enter **Received**, click **Add**. Finally click **OK**.



Search Text	×
Specify $\underline{w} \text{ords}$ or phrases to search for in the subject:	
	<u>A</u> dd
Search list:	_
"Rejected" or "Action Required" or "Received"	<u>R</u> emove
ОК	Cancel

13. Click Next. The *Finish rule setup* screen displays summarising your rule.

### 14. Click Finish, Apply.

The end result is that any system generated iProcurement email that is sent from UFS\_Notification, unless it has the words 'rejected', 'received', 'action required' in the subject, will go to the new folder.

## Other Guides to Mail Filtering

- All other Outlook versions <u>Manage email messages by using rules</u>
- Mozilla Thunderbird Organize Your Messages by Using Filters
- Apple Mail <u>Use rules to manage emails you receive in Mail on Mac</u>
- Gmail Create rules to filter your emails