

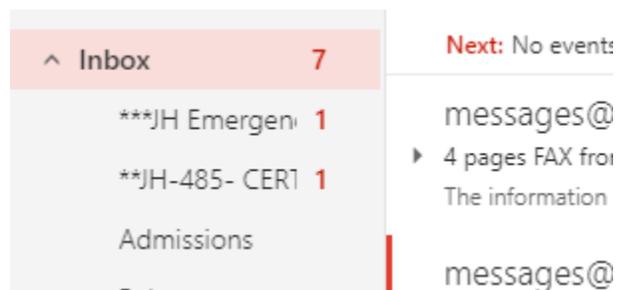
## Automatically Sorting E-mail Messages

Please note: this tutorial relies on using the web interface for accessing COG e-mail. While each of these processes are possible using the local version of Outlook, most COG-ers use the on-line version.

### Purpose

Create a folder under your inbox and create a rule to capture messages based on selective criteria when a message is received. This will be explained in two sections. The first explains how to create a folder, the second discusses how to quickly create a rule to place messages in various folders.

### Section 1 – Creating folders



Above is a picture of a standard inbox. Folders can be created by right-clicking on the name of a folder and choosing “Create new subfolder”. Once selected, type the name of your folder and press Enter.

### Section 2 – Create sorting rules

Sorting messages can get complex. Rules upon rules upon rules can be created and myriad options exist for what’s being sorted. A few examples will be offered, but for purposes of illustration only one rule will be shown. One helpful example: the author of this paper doesn’t need the 5am call update so has created a rule to put all of those messages into a particular folder, removing the possibility of the wake-up call every day when the patient update comes through from stalwart senders just leaving call-duty.

#### A few examples:

- move messages received from a particular sender
- move messages with particular information in the subject (shown below)
- mark messages with the phrase “circus clowns with green noses” in the body of an e-mail as read
- lots and lots of other options

#### Show Me:

In this exercise, we’ll create a rule to move a message out of the inbox and into a folder based on text contained in the subject

1) Right click on the message and select “Create rule...”

✓ OK   ✕ Cancel

New inbox rule

Name

Move messages from messages@concordfax.com

When the message arrives, and it matches all of these conditions

✕ It was received from... messages@concordfax.com

✕ and it was sent to... Fax Inbound

✕ and it includes these words in the subject... 2 pages FAX from 16142314900 sent to +16148679889

Add condition

Do all of the following

Move the message to folder... Select one...

Add action

Except if it matches any of these conditions

Add exception

Stop processing more rules (What does this mean?)

2) Default sorts shown and what they mean

- a. Name: Give a name to your rule for future reference
- b. Conditions: This is a list of default choices presented when you start a new rule. Conditions that you don't want can be deleted by clicking on the “x” to the left of each condition. Conditions can also be edited by clicking on the red text to the right, and additional conditions can be added by clicking the “Add condition” button.
- c. Do all of the following: The default behavior is to “Move the message to folder...” and requires you to click the “Select one...” button to do something. Additional actions can also be applied such as deleting a message, marking messages as read or important. It is also possible to forward messages to a particular e-mail address.
- d. Except if it matches any of these conditions: For example, if you want to send a message to a folder “favorite recipes”, unless it contains the word “chicken liver”.
- e. Stop processing more rules: a bit advanced. You can generally leave this box checked.

3) Let's create a rule that will move any message with a phone number in the subject to a folder created for a particular facility, in this case Wexner Heritage Village.

- a. Name: WHV Fax
- b. Delete condition “It was received from...” by clicking the “X”
- c. Delete condition “It was sent to...” by clicking the “X”
- d. Edit condition “It includes these words in the subject...” by clicking on the red text to the right. The text “2 pages” may change from time to time, but the information “from 16142314900” will be consistent so we can use this information to sort the message.

Specify words or phrases

✎ ✕

Enter words... +

2 pages FAX from 16142314900 sent to +16148679889

- i. After clicking on the red text, double click on the text you wish to edit. Remove unnecessary text and press Enter.
- e. Look to the top of the window (on the left) and click Save

4) From now on, messages containing “from 16142314900” will skip the inbox going instead to the “WHV” folder.