



PHASE 1: SETTING UP A RULE IN OUTLOOK

An Informative Guide for Staff Members and Supervisors

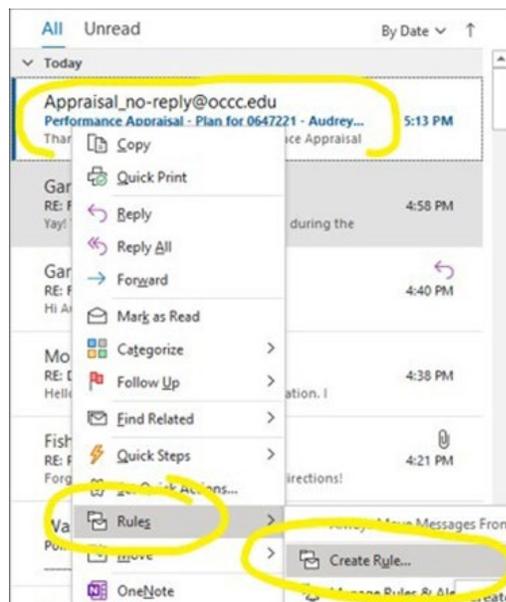
When information related to your performance appraisal is entered in the system by you or your supervisor, it will generate an email from **appraisal_no-reply@occc.edu**. These emails will contain all the information discussed and agreed upon during each phase, related to your annual performance appraisal. The process builds on itself throughout the phases, and you must reference the previous information while completing the current phase. The easiest way to ensure that you have all you will need to complete each phase, is to set up a rule in Outlook so it is all filed in the same location. This document provides detailed instructions for how to set up the rule.

Add A New Folder In Outlook

- Open Outlook
- Right click on “Inbox”
- Select “New Folder”
- Type “Performance Appraisals” in the box that appears
- Click “Enter” and you will see your new folder

Set Up The Rule

- Right click on an email from “appraisal_no-reply@occc.edu”
- Click on “Rules”
- Click on “Create Rule”
- Your screen will look like this

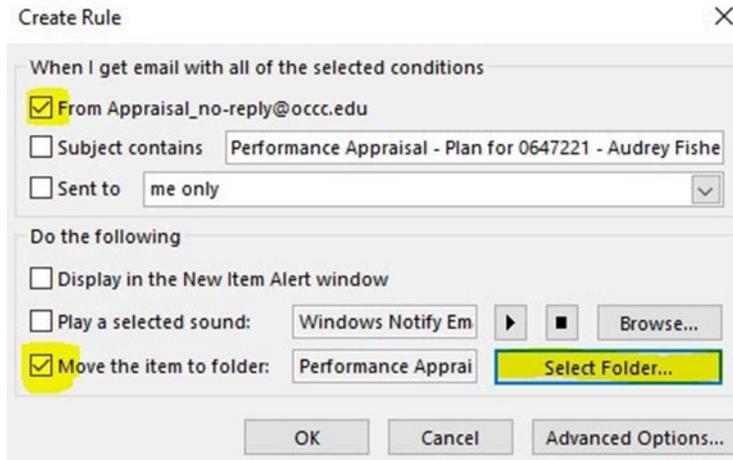




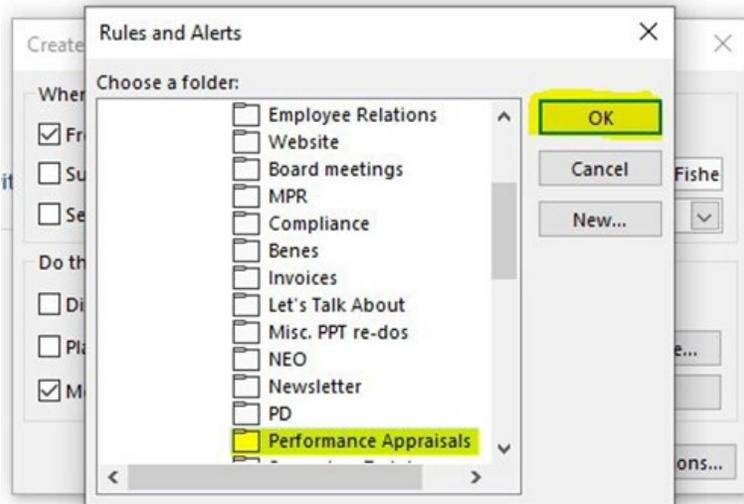
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Set Up The Rule (cont'd)

- You will see this screen next
- Click on the first condition
- Click "Move the item to folder:"
- Click "Select Folder"



- You will see this screen next
- Locate/choose the "Performance Appraisals" folder
- Click "OK"





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Set Up The Rule (cont'd)

- After clicking “OK”, it will take you back to this screen
- Click “OK” once more

Create Rule

When I get email with all of the selected conditions

From Appraisal_no-reply@occc.edu

Subject contains Performance Appraisal - Plan for 0647221 - Audrey Fishe

Sent to me only

Do the following

Display in the New Item Alert window

Play a selected sound: Windows Notify Em

Move the item to folder: Performance Apprai

OK Cancel Advanced Options...

- You will see this screen next
- Click in the box next to “Run this rule...”
- Click “OK”

When I get email with all of the selected conditions

From Appraisal_no-reply@occc.edu

Success

The rule "Appraisal_no-reply@occc.edu" has been created.

Run this rule now on messages already in the current folder

OK

Move the item to folder: Performance Apprai

OK Cancel Advanced Options...

Once you click “OK”, the email you used to set the rule and any emails you receive from “appraisal_no-reply@occc.edu” in the future, will automatically move to your “Performance Appraisal” folder. If you do not see the email in your new folder after going through the steps, repeat each step once more from the beginning. If that does not work, please contact the OCCC Help Desk at (405) 682-7777 for additional technical assistance.