



OKLAHOMA CITY
COMMUNITY COLLEGE

PHASE 1: SETTING UP A RULE IN OUTLOOK

An Informative Guide for Staff Members and Supervisors

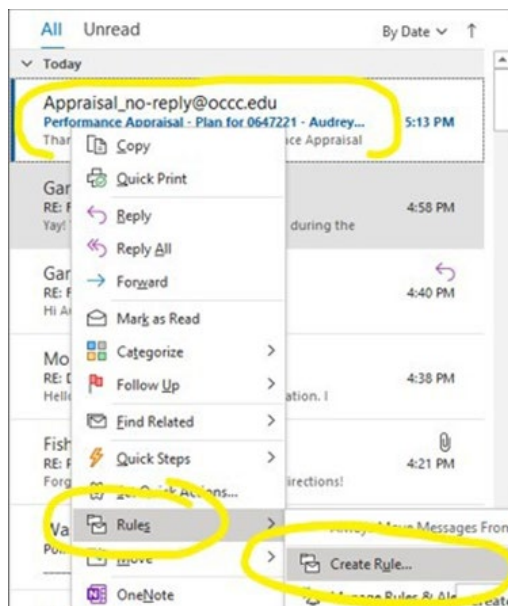
When information related to your performance appraisal is entered in the system by you or your supervisor, it will generate an email from **appraisal_no-reply@occc.edu**. These emails will contain all the information discussed and agreed upon during each phase, related to your annual performance appraisal. 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"

The "Create Rule" dialog box is shown. It has a title bar with "Create Rule" and a close button. The main area is divided into two sections. The first section, "When I get email with all of the selected conditions", contains three checkboxes: "From Appraisal_no-reply@occc.edu" (checked), "Subject contains" (with a text box containing "Performance Appraisal - Plan for 0647221 - Audrey Fishe"), and "Sent to" (with a dropdown menu showing "me only"). The second section, "Do the following", contains three checkboxes: "Display in the New Item Alert window", "Play a selected sound:" (with a dropdown menu showing "Windows Notify Em" and a "Browse..." button), and "Move the item to folder:" (checked). The "Move the item to folder:" checkbox is highlighted with a yellow box. To its right is a text box containing "Performance Apprai" and a "Select Folder..." button, which is also highlighted with a yellow box. At the bottom are three buttons: "OK", "Cancel", and "Advanced Options...".

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

The "Rules and Alerts" dialog box is shown. It has a title bar with "Rules and Alerts" and a close button. The main area is titled "Choose a folder:" and contains a list of folders. The folders are: Employee Relations, Website, Board meetings, MPR, Compliance, Benes, Invoices, Let's Talk About, Misc. PPT re-dos, NEO, Newsletter, PD, and Performance Appraisals. The "Performance Appraisals" folder is highlighted with a yellow box. To the right of the list are three buttons: "OK" (highlighted with a yellow box), "Cancel", and "New...".



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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 Fische

☐ Sent to me only

Do the following

☐ Display in the New Item Alert window

☐ Play a selected sound: Windows Notify Em [Browse...]

☒ Move the item to folder: Performance Apprai [Select Folder...]

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 [Select Folder...]

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.