How to create an Outlook Rule that will automatically forward SuccessFactors emails to the proxy

1. Access Outlook

2. From the Tools Menu select the Tools option from the menu bar

3. Select the Rules and Alerts option from the Tools Menu

4. From the Rules and Alerts window select the E-mail Rules Tab
5. From the Rules Wizard window, select the radio button next to the Start from a blank rule option.

- For Step 1: Highlight the option Check Messages when they arrive.
- For Step 2: do not change
- Click on the next button to continue

6. The next Rules Wizard screen sets up the condition that you are looking for.

- Step 1: Place a check next to from people or distribution list f
- Step 2: In the From box, paste the following - SuccessFactors University Administrator [kellyp@musc.edu].
- Click on the ok button to continue. Step 2 will now display from Kelly, Patti A.
- Click on the next button to close move to the screen
7. Next, select what you want to do with message.

**Step 1. Select the following two options:**

- **Delete it** – this will remove it from the inbox of the person receiving the message and move it to the deleted folder
- **Redirect it to people or distribution list** – this will send it to which you designate (proxy).

- **In Step 2** click on **people or distribution list** to tell Outlook who to send it to in the Rules address box. (the persons proxy) When done click on OK.

- This has now directed Outlook to send all messages sent by Kelly, Patti A. to their inbox to delete it and send the message to “Gough, Joe” (proxy).
• Click the Next button to continue
• There are no exceptions so just click on the Next Button to continue

8. The final screen asks you to name the rule. I have called mine SF Notices. Make sure there is a check on turn this rule on and click the Finish button

9. The final step is to click on the Apply Button to set the rule to be active. If you ever want to turn it off, just remove the check next to the rule.

If you have questions regarding the rules process, please contact the help desk at 792-9700.