Sunnybrook REB Information System



SunRISE Tipsheet — Principal Investigator (PI)

Description- SunRISE Email Folder

Particularly for research teams involved with CTO (Clinical Trials Ontario) projects, it is strongly advised to set up a separate folder in Sunnybrook Outlook in order to filter incoming SunRISE emails. The folder should automatically file emails that are sent from <u>donotreply@infonetica.net</u> AND contain the term "SunRISE" in the subject or body.

Why should I setup this folder?

Emails will be sent from <u>donotreply@infonetica.net</u> for both SunRISE and CTO. The folder ensures SunRISE emails are filed to its own folder in Outlook and are not confused with CTO.

TIP— SunRISE emails are sent to the PI's email address listed on the Initial Application Form in SunRISE. System notifications are sent to the "Project Owner" (i.e. the individual who creates the project in SunRISE)

How to Setup the SunRISE Email Folder

Access Outlook from the Desktop

- 1. Create a new folder
 - 1. Decide on the location of the new folder in the left-hand side bar and right-click the location
 - 2. Click New Folder and name the folder (e.g. SunRISE)

2. Create the filter rules

1. Click File, then Manage Rules and Alerts



2. Click **New Rule** ^{Mew Rule...} in the pop-up window

E-mail Rules Manage Alerts		
New Rule Phange Rule * Copy Delete 4 Rule (applied in the order shown) Image: Rule shown) Image: Rule shown) Image: Rule shown) Image: Sum ISE Image: Rule shown show	Run Rules Now Options	*
Rule description (click an underlined value to edit): Apply this rule after the message arrives from donotreply@infonetica.net and with SunRISE in the subject or body move it to the <u>-SunRISE Emails</u> folder and stop processing more rules		Ŧ
Enable rules on all messages downloaded from RSS Feeds		
	OK Cancel	Apply

3. Select Apply rule on messages I receive Apply rule on messages I receive and click Next

Rules Wizard	x	
Start from a template or from a blank rule		
Step 1: Select a template		
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		
- Apply rate of messages t bena		
Step 2: Edit the rule description (click an underlined value)		
Apply this rule after the message arrives		
Cancel < Back Next > Finish		

4. Select both "from people or public group" and "with specific words in the subject and body"

Rules Wizard	×
Which condition(s) do you want to check?	
Step 1: Select condition(s)	
from people or public group	
with specific words in the subject	
through the <u>specified</u> account	
sent only to me	
where my name is in the To box	
marked as importance	=
marked as <u>sensitivity</u>	
flagged for <u>action</u>	
where my name is in the Cc box	
where my name is in the To or Cc box	
where my name is not in the To box	
with specific words in the last	
with specific words in the subject or body	<u> </u>
with specific words in the subject of body	
with specific words in the recipient's address	
with specific words in the sender's address	
assigned to <u>category</u> category	-
Step 2: Edit the rule description (dick an underlined value)	
Apply this rule after the message arrives	
from people or public group	
and with <u>specific words</u> in the subject or body	
Cancel < Back Next > Fi	nish

5. In the bottom part of the pop-up widow, click on **people or public group**. In the field type: <u>donotreply@infonetica.net</u> . Then click **Ok**

Rules Wizard	
Which condition(s) do you want to check? Step 1: Select condition(s)	
from people or public group with specific words in the subject through the specified account sent only to me	Rule Address
where my name is in the To box marked as importance marked as <u>sensitivity</u>	Search: Name only More columns Address Book Go Global Address List - jasmine.djordjevic@sunn Advanced
If agged for <u>action</u> where my name is in the Cc box where my name is in the To or Cc box where my name is not in the To box sent to <u>people or public group</u> with <u>specific words</u> in the body with <u>specific words</u> in the subject or body with <u>specific words</u> in the recipient's address with <u>specific words</u> in the sender's address assigned to <u>category</u> category	Name Title Business Phone Location ITB-Boardroom, ITB-Boardroom ITB-Boardroom, ITB-Boardroom ITB-Chcas, ITB-Ohcas - North W ITB-Boardroom, ITB-Boardroom ITB-ResourceBooking, ITB-Resou ITB-ResourceBooking, ITB-Resou ITB-SysAlerts, ITB-SysAlerts - N ITB-SysAlerts, ITB-SysAlerts - N ITB-Boardroom ITB-SysAlerts, ITB-SysAlerts - N ITB-SysAlerts, ITB-SysAlerts - N ITB-SysAlerts, ITB-SysAlerts - N ITB-SysAlerts, ITB-SysAlerts - Pembroke ITB-SysAlerts, ITB-SysAlerts - N ItB-SysAlerts, ITB-SysAlerts, ITB-SysAlerts - Pembroke ItB-SysAlerts, ITB-SysAlert, ITB-SysAlert, ITB-SysAlert, ITB-SysAlert, ITB-SysAlert, I
Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from <u>Deople or public group</u> and with <u>specific words</u> in the subject or body	#Bayview Campus #BCNP_Group #CCO, EmptyList1 #CCO, EmptyList2 #CCO, EmptyList2 #CCO EmptyList3
Cancel < Back Next > Finis	sh

6. In the bottom part of the pop-up widow, click on <u>specific words</u>. In the field type <u>donotreply@infonetica.net</u>, then **Add**, then **Ok**



6. In the bottom part of the pop-up widow, click on <u>specific words</u> in the subject or body. In the field type: SunRISE. Click Add, then Ok

Search Text	X
Specify words or phrases to search for in the subject or body:	
SunRISE	Add
Search list:	
	Remove
OK	Cancel
	Carlee

7. Click Next

Rules Wizard			
Which condition(s) do you want to check?			
Step 1: Select condition(s)			
✓ with specific words in the subject or body			
✓ from people or public group			
with specific words in the subject			
through the specified account			
sent only to me			
where my name is in the To box			
marked as importance			
marked as <u>sensitivity</u>			
flagged for action			
where my name is in the Cc box			
where my name is in the To or Cc box			
where my name is not in the To box			
sent to people or public group			
with specific words in the body			
with specific words in the message header			
with specific words in the recipient's address			
acciment to category category			
assigned to <u>category</u> category			
Step 2: Edit the rule description (click an underlined value)			
Apply this rule after the message arrives			
from donotreply@infonetica.net			
and with SunRISE in the subject or body			
Cancel < Back Next > Finish			

8. Check the move it to the specified folder checkbox



9. In the bottom part of the pop-up widow, click on <u>specified</u> folder. In the pop-up window, click on your new folder.



- 10. Locate the SunRISE folder you created and click **Ok**.
- 11. Click Finish
- 12. Click Apply