M365 Outlook Rules and Delegation Job Aid



Create Outlook Rules

Use Inbox rules to automatically perform specific actions on email that arrives in your inbox. **Note**: Rules only run on your Inbox; they cannot run on other folders.

To Create a Rule:

- 1. Click the **File** tab.
- 2. Click Manage Rules & Alerts.
- 3. Select New Rule...

Result: The Rules Wizard dialog page

tart from a tem			
	plate or from a blank rule		
tep 1: <u>S</u> elect a 1	emplate		
Stay Organized	1		
🔄 Move m	essages from someone to a folde	er	
🔛 Move m	essages with specific words in th	e subject to a folder	
🔛 Move m	essages sent to a public group to	o a folder	
🏴 Flag me	ssages from someone for follow-	up	
🔁 Move RS	S items from a specific RSS Feed	to a folder	
Stay Up to Dal	e		
🙀 Display	mail from someone in the New It	em Alert Window	
🕼 Play a so	ound when I get messages from s	omeone	
. Send an	alert to my mobile device when I	l get messages from so	meone
Start from a bl	ank rule		
🗠 Apply ru	le on messages I receive		
> Apply ru	de on messages I send		
	_		
tep 2: Edit the	rule <u>d</u> escription (click an underlir	ned value)	
Apply this rule	after the message arrives		
from people of	r public group		
	specified folder		
move it to the			

- Select one of the options in Step 1.
 Tip: If you are new to Outlook rules, carefully review the template options, noting that you can:
 - a. Move emails automatically into folders
 - b. Flag messages from someone (your manager or other leader, for example).
 - c. Trigger alerts, sounds, or mobile device alerts.

5. Click a link in the Step 2 section to specify the behavior of the rule.

Step 2: Edit the rule <u>d</u> escription (click an underlined value) Apply this rule after the message arrives from <u>Nathan Howell</u> flag message for <u>Follow up Today</u>							
Example: Flag mai	l from my ma	nager for foll	ow-up today		Finish		

6. Click the **Finish** button.

Note: If you are creating a rule that sends an email to a folder, click the **Next** button to assign the desired folder.

Tip: Start from a blank rule (in Step 1) is very flexible and enables you to configure almost infinite combinations of logic.

- 1. After creating a rule, you can initiate editing the rule in one of two ways:
 - Click the File tab → Manage Rules & Alerts, or
 - Right-click any email, hover over Rules, and then select Manage Rules & Alerts.
- 2. Click the rule you wish to edit and then click **Change Rule**.



- 3. Choose from the options in the list and make changes as needed in the dialog boxes that follow.
- 4. When finished, click **OK**.

Add a Delegate for Mail and/or Calendar

Delegation enables another person to perform many actions on your behalf. This is useful for executive administrative assistants or for managers covering for employees who are on vacation.

To delegate your mail and/or calendar:

 Click the File tab → Account Options → Delegate Access, as shown below:



- 2. Click **Add...** on the **Delegates** dialog box.
- Use the Add Users dialog (Address Book) to search for the desired delegate's name and click Add, then OK.
- 4. Check both the checkboxes highlighted below. Continue step 5.

Delegat	e Permissio	ns: Barrett Hobbs	×			
This d	elegate has	the following permissions				
	<u>C</u> alendar	Editor (can read, create, and modify items) $$				
Delegate receives copies of meeting-related messages sent to me						
Ż	Tasks	None ~				
	<u>I</u> nbox	None ~				
2	C <u>o</u> ntacts	None Reviewer (can read items) Author (can read and create items)				
	<u>N</u> otes	Editor (can read, create, and modify items) None ~				
🗹 Auto	matically <u>s</u> er	nd a message to delegate summarizing these permissions				
Delegate can see my private items						
		OK Cancel				

 Make other selections for Calendar, Inbox, or Tasks as appropriate, and then click OK.

Tip: The Inbox options are expanded in the preceding image so you can see the descriptions of each role. Note that **Editors** have complete control—including the ability to modify or delete items that you created. **Authors** can only create or modify items they created.

Important: Delegates must perform the actions specified in the email they receive or they will not be able to access your mail/calendar.

Modify or Remove a Delegate

- Click the File tab → Account Options
 → Delegate Access, as shown at left.
- Click the name of the delegate.
 Note: If you only have one delegate they are selected by default.
- Click **Remove** to completely remove delegated permissions or click **Permissions...** to modify permissions using the same dialog box shown at left.



4. Click **OK** with finished.

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