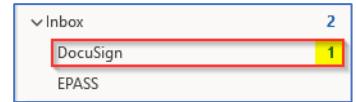


ORGANIZING OUTLOOK INBOX

Revised July 6, 2023

OVERVIEW

This chapter provides instructions on how to **automatically sort emails from a particular Sender into separate Outlook folder**. This will provide a visual indicator that new emails are received from that Sender. This will help ensure messages don't get lost in your general Inbox.

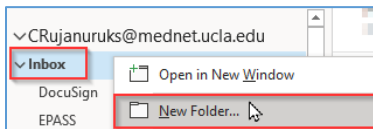


Suggested folders to set up for automatic email sorting:

- Approvals – Emails that notify an action is required (see sample emails on page 2):
 - PAMS Closeout Packets
 - UCPATH Direct Retro or Funding Entry Transactions
 - DocuSign Documents
 - PANS
- Specific Senders – Emails from specific senders
- Common Mass Listserv Emails that do not require immediate attention

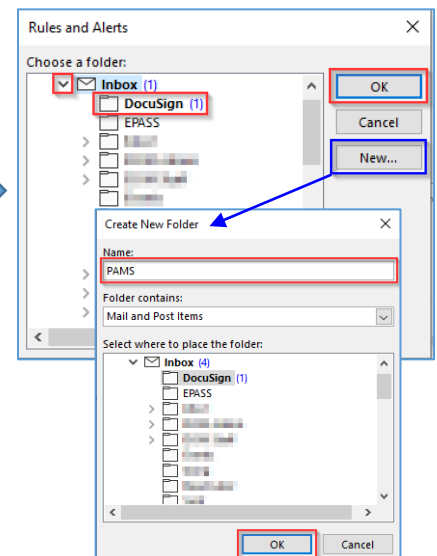
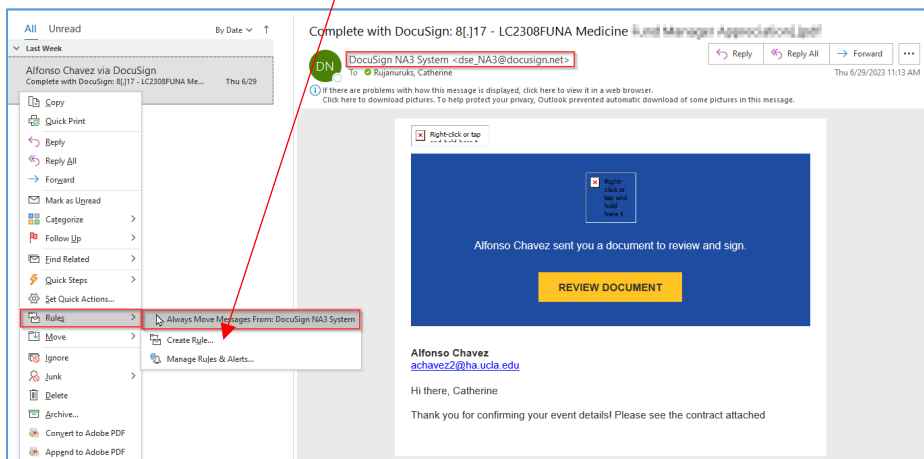
STEPS

1. **Create folder(s)** under Inbox: *Right-click* on “Inbox” > Choose “New Folder...” > Name new folder.
 - OR create the Rule and generate a new folder at the same time. See step 2.



2. **Create rule** to sort email automatically: *Right-click* on a message you'd like to start auto-sort > Select “Rules” > Choose “Always Move Messages From: [name of sender]” > Click on the “v” to expand Inbox folders > Choose the folder you'd like emails to auto-sort into OR **create new folder at this time by typing in new folder name** > Click “OK”

- **Note:** To make the rule more complicated, right-click a message and select **Rules > Create Rule**. Read [Manage email messages by using rules](#) to learn more.



SAMPLE EMAILS

Below are some sample emails to create folders and rules to improve visibility of these specific emails.

PAMS Closeout Packets

Closeout Packet Action Required: 31141-Fogelman

N Noreply@research.ucla.edu
To: [Redacted]

Tue 6/27/2023 2:52 PM

Dear [Redacted],

Closeout packet 31141-Fogelman for 1553-MEDICINE-CARDIOLOGY has been **routed to you and requires your action**. Please log into PAMS <https://pams.research.ucla.edu/> and take the necessary actions.

This notice has been generated automatically based on the status of Closeout Packets. Please contact PAMS Help if you have any questions.

PAMS Help
PAMSHelp@research.ucla.edu
310-794-0008

UCPath Direct Retro or Funding Entry Transactions

UCPath Funding Entry Transaction Approval Request

UN ucpath-notifications@universityofcalifornia.edu
To: [Redacted]

Thu 7/6/2023 10:16 AM

A transaction of Funding Entry (Request ID: FE01142796) has been **routed to you for its next level of approval**. Would you please approve it (if appropriate) at your earliest convenience? Thank you.

You may process this transaction at
[https://urldefense.com/v3/https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/UC_EXTENSIONS_UC_DEPTBDGT_ERN.GBL?Page=UC_DEPTBDGT_ERN&Action=U&REQUEST_ID=FE01142796&SETID=LACMP&DEPTID=155800&FISCAL_YEAR=2024;!!F9wkZzsl-LA!ApgR_QvTL3dvM4ijWwBeBvMD_kLJAHYj5qA01oU03GzyFvT7NNXOUDJ9MWJhOmBzGObshYw8_x5KIFMTy-ZTAXNO4aA19UDla6DLFKDrOL\[PbG-Cs\\$](https://urldefense.com/v3/https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/UC_EXTENSIONS_UC_DEPTBDGT_ERN.GBL?Page=UC_DEPTBDGT_ERN&Action=U&REQUEST_ID=FE01142796&SETID=LACMP&DEPTID=155800&FISCAL_YEAR=2024;!!F9wkZzsl-LA!ApgR_QvTL3dvM4ijWwBeBvMD_kLJAHYj5qA01oU03GzyFvT7NNXOUDJ9MWJhOmBzGObshYw8_x5KIFMTy-ZTAXNO4aA19UDla6DLFKDrOL[PbG-Cs$) [ucpath].[universityofcalifornia].[jedu]

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

DocuSign Documents

Complete with DocuSign: 8[,17 - LC2308FUNA Medicine [Redacted].pdf

DN DocuSign NA3 System <dse_NA3@docuSign.net>
To: [Redacted]

Thu 6/29/2023 11:13 AM

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Alfonso Chavez sent you a **document to review and sign**.

REVIEW DOCUMENT

PANS

Notice of Post Authorization Notifications Generated

P PANPROD@ZOS.AIS.UCLA.EDU
To: [Redacted]

Wed 7/5/2023 9:33 PM

We removed extra line breaks from this message.

1 notifications were generated **for your review** since July 5, 2023 12:01:56.

- PURCHASING : 1

Please review the notifications using Web PAN at [https://urldefense.com/v3/https://pps1pan.ais.ucla.edu/panWeb;!!F9wkZzsl-LA!DEAJDIX_YolctyBXDI2XCjrjxLxGkRCqNj_jimMGPKeoJzC1fOHgB869D5RtaB1adQqgFFC6FGCNvFWoC6y4-uFZGxwC8k\\$](https://urldefense.com/v3/https://pps1pan.ais.ucla.edu/panWeb;!!F9wkZzsl-LA!DEAJDIX_YolctyBXDI2XCjrjxLxGkRCqNj_jimMGPKeoJzC1fOHgB869D5RtaB1adQqgFFC6FGCNvFWoC6y4-uFZGxwC8k$) [pps1pan].[ais].[ucla].[jedu] and accessing your PAN inbox