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**

Dear [Name],

Closeout packet 31141-Fogelman for 1055-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
310-794-8046

**UCPath Direct Retro or Funding Entry Transactions**

**UCPath Funding Entry Transaction Approval Request**

A transaction of Funding Request (Request ID: F011342716) 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://ucpath.universityofcalifornia.edu/employeessoftware/EMPLOYEE/HIMF/UC_EXTENSION/UC_DEBTBOO](https://ucpath.universityofcalifornia.edu/employeessoftware/EMPLOYEE/HIMF/UC_EXTENSION/UC_DEBTBOO). For more information, please refer to the following: [https://helpdesk.ucla.edu/knowledgebase/article/31063](https://helpdesk.ucla.edu/knowledgebase/article/31063).

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

**DocuSign Documents**

**Complete with DocuSign: 8.117 - LC2308F UNA Medicine Fund Manager Approval Form**

If a problem 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.

**PANS**

**Notice of Post Authorization Notifications Generated**

1 notifications were generated for your review since July 3, 2023 12:01:56.

Purchasing

Please review the notifications using WebPAN at [https://panspan.ucla.edu/panweb](https://panspan.ucla.edu/panweb).